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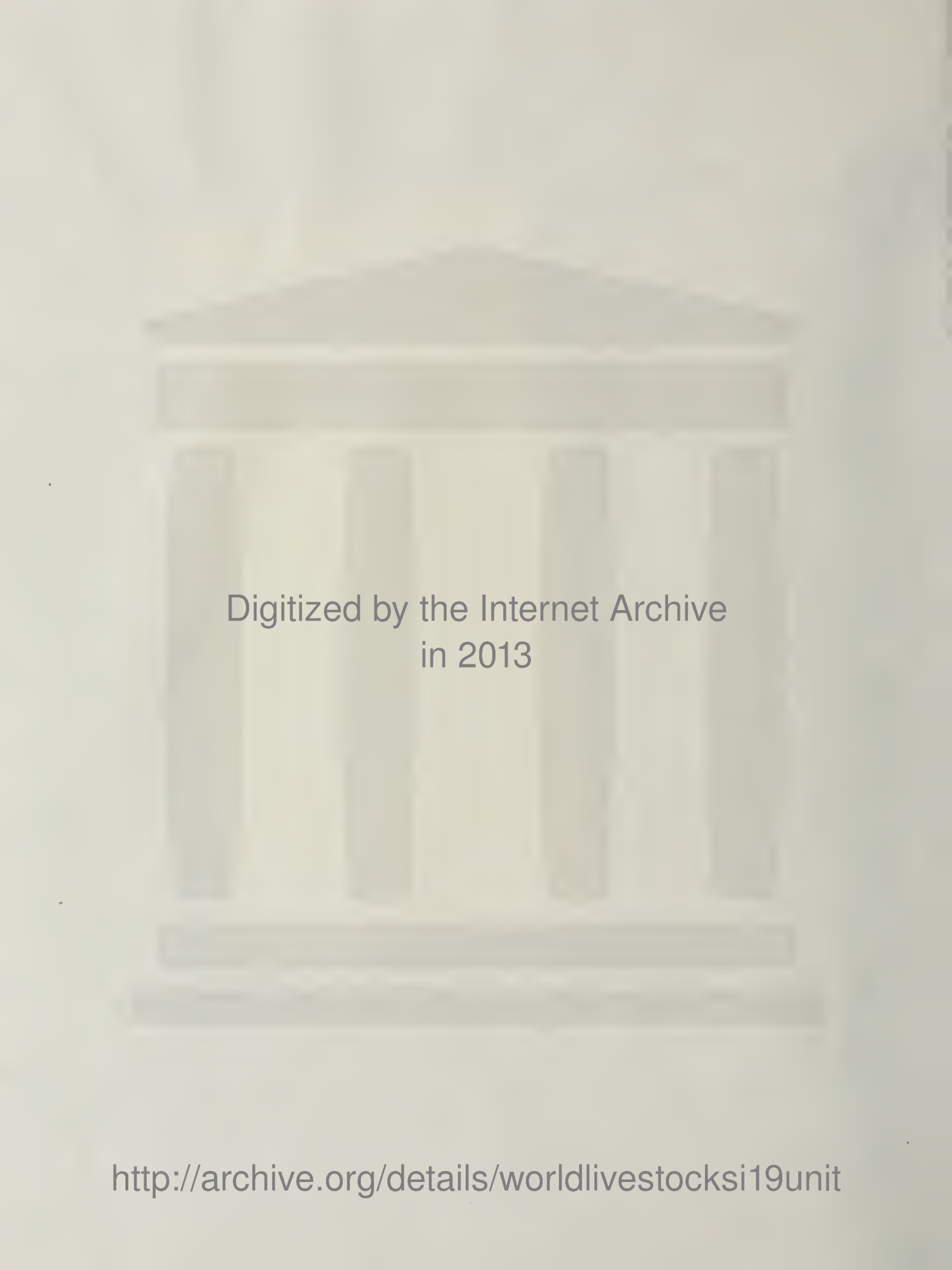
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World Livestock Situation

Circular Series:
FL&P 2-92
March 1992

-- In 1992, world beef imports are expected to increase as a result of higher purchases by Japan, Korea, and Mexico and larger shipments to the newly independent states of the former Soviet Union.

-- World consumption of beef is once again on the upswing. Growth is expected in most major producing and consuming nations, with the exception of the newly independent states of the former Soviet Union and Eastern Europe. Reduced supplies and price realignment appear to be forcing consumption down in those evolving economies.

-- Total world pork production is projected to be up slightly in 1992, with exports forecast to remain steady at about 2.1 million tons. Growth in exports from Taiwan, China, Canada, and the United States is expected to be offset by sharply smaller shipments from eastern Germany to the newly independent states of the former Soviet Union.

-- Sheep meat production is forecast to be stable in 1992, though well above levels of the late 1980's, as producers continue stepped-up slaughter of wool producing stock. Sheep meat exports of the two major suppliers, Australia and New Zealand, should be flat at about 700,000 tons.

-- In 1992, the major buying and processing countries for hides and skins are projected to reduce imports slightly as finished products face decreased demand due to economic recession in major markets.

-- Because of the continued price advantage of palm oil products, industrial use of tallow is forecast to slide further in 1992, while feed use is on the upswing.

Approved by the World Agricultural Outlook Board - USDA

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Information featured in this publication is based primarily on reports from FAS overseas posts. This publication would not be possible without the contributions of Agricultural Counselors, Attaches, and Trade Officers and their foreign Agricultural Specialists and staff based in each country.

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Note: Estimates of the former USSR in this report cover the same area previously designated as the Soviet Union.

PER CAPITA BEEF AND VEAL CONSUMPTION
SELECTED COUNTRIES

(IN KILOGRAMS, CARCASS-WEIGHT-EQUIVALENT)

	1987	1988	1989	1990	1991 PRELIM	1992 FORECAST
NORTH AMERICA						
CANADA	39.8	39.8	39.3	37.7	36.7	36.7
MEXICO	14.7	21.1	25.3	21.0	18.6	18.8
UNITED STATES	47.8	47.3	45.0	44.1	43.8	44.2
CARIBBEAN						
DOMINICAN REPUBLIC	6.5	6.6	6.8	5.2	5.1	5.3
CENTRAL AMERICA						
COSTA RICA	22.9	21.9	20.3	21.8	21.9	21.9
EL SALVADOR	3.6	4.3	5.0	4.9	5.2	5.2
GUATEMALA	5.0	5.9	5.1	4.5	4.3	4.1
HONDURAS	4.0	3.8	2.9	2.3	1.7	1.6
SOUTH AMERICA						
ARGENTINA	77.5	73.1	70.5	68.7	70.1	69.0
BRAZIL	26.7	24.5	24.7	23.6	22.5	22.6
COLOMBIA	20.6	22.1	22.7	23.6	23.9	23.9
URUGUAY	60.9	64.9	63.9	58.6	55.7	63.2
VENEZUELA	15.1	16.2	18.2	19.7	18.5	17.8
EUROPEAN COMMUNITY						
BELGIUM-LUXEMBOURG	24.4	22.8	21.7	21.3	20.9	20.5
DENMARK	15.9	18.2	20.5	20.7	21.0	20.9
FRANCE	31.0	29.7	29.8	29.6	30.0	29.9
GERMANY	22.5	21.4	20.5	19.3	21.3	21.3
GREECE	25.5	25.0	23.9	21.4	21.9	22.1
IRELAND	21.2	19.3	18.8	17.1	16.9	17.2
ITALY	27.1	26.9	26.8	26.6	26.7	26.6
NETHERLANDS	20.0	17.3	17.8	18.3	18.0	17.9
PORTUGAL	12.9	13.3	13.5	13.8	14.1	14.3
SPAIN	12.2	12.4	11.6	12.4	12.4	12.5
UNITED KINGDOM	22.5	21.5	21.4	18.5	19.8	20.5
OTHER WESTERN EUROPE						
AUSTRIA	22.4	22.2	22.0	22.0	21.9	22.0
FINLAND	20.9	20.8	20.4	21.7	21.6	21.6
SWEDEN	17.3	16.8	17.0	17.5	17.9	18.1
SWITZERLAND	27.9	25.7	25.1	25.5	25.5	25.5
EASTERN EUROPE						
BULGARIA	13.4	13.2	14.8	14.7	13.5	13.8
CZECHOSLOVAKIA	27.2	27.0	29.3	26.4	21.9	21.6
HUNGARY	8.0	7.2	7.4	6.7	6.5	6.5
POLAND	21.4	21.4	20.7	20.6	20.0	18.2
ROMANIA	5.5	5.0	5.0	18.5	12.6	9.8
YUGOSLAVIA	13.0	13.8	13.6	15.5	14.6	13.7
FORMER USSR	29.7	30.4	31.0	31.1	29.2	27.6
MIDDLE EAST						
ISRAEL	17.4	16.6	16.8	17.0	17.2	16.9
SAUDI ARABIA	3.5	3.1	2.9	2.9	2.9	3.1
TURKEY	5.0	5.1	5.1	5.2	5.2	5.6
NORTH AFRICA						
EGYPT	10.9	10.2	10.6	9.7	9.5	9.5
OTHER AFRICA						
SOUTH AFRICA, REP OF	17.5	16.4	16.6	17.4	17.2	17.3
SOUTH ASIA						
INDIA	2.4	2.0	2.1	2.1	2.0	2.0
OTHER ASIA						
CHINA	0.7	0.8	0.9	1.0	1.1	1.2
HONG KONG	14.0	15.6	14.0	13.9	13.8	13.8
JAPAN	7.2	7.3	8.0	8.7	9.1	9.6
KOREA, REPUBLIC OF	5.0	4.6	4.6	5.7	7.1	8.5
TAIWAN	2.2	2.5	2.6	2.5	2.8	2.8
PHILIPPINES	1.9	2.1	2.2	2.2	2.1	2.1
OCEANIA						
AUSTRALIA	39.3	40.2	41.9	38.5	37.1	38.7
NEW ZEALAND	39.3	38.5	38.1	33.4	34.1	33.1

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.
POPULATION DATA FOR DERIVING PER CAPITA FIGURES WERE OBTAINED FROM ERS, USDA.
NOTES: SPAIN AND PORTUGAL JOINED THE EUROPEAN COMMUNITY IN 1986.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

PER CAPITA PORK CONSUMPTION
SELECTED COUNTRIES

(IN KILOGRAMS, CARCASS-WEIGHT-EQUIVALENT)

	1987	1988	1989	1990	1991 PRELIM	1992 FORECAST
NORTH AMERICA						
CANADA	33.2	33.9	34.0	31.5	32.4	31.6
MEXICO	11.6	11.7	10.9	9.2	9.6	9.6
UNITED STATES	28.5	30.5	30.2	29.0	29.5	31.4
CENTRAL AMERICA						
GUATEMALA	1.7	1.6	1.6	1.5	1.5	1.5
SOUTH AMERICA						
BRAZIL	8.2	7.5	6.7	6.8	7.0	7.1
COLOMBIA	3.9	4.1	4.3	4.3	4.1	3.8
VENEZUELA	7.6	7.7	6.3	5.2	5.3	5.1
EUROPEAN COMMUNITY						
BELGIUM-LUXEMBOURG	48.6	49.6	49.7	46.7	46.2	45.6
DENMARK	65.7	64.3	65.1	67.2	66.6	66.0
FRANCE	36.6	37.1	37.4	37.3	37.0	37.0
GERMANY	55.3	55.8	56.1	53.2	48.3	48.1
GREECE	22.2	21.2	20.6	20.5	21.0	21.2
IRELAND	33.3	35.1	34.7	35.4	35.5	35.9
ITALY	28.4	29.6	30.6	30.9	31.2	31.3
NETHERLANDS	43.0	46.7	44.6	44.0	44.3	44.4
PORTUGAL	22.1	23.9	23.9	24.9	25.4	25.9
SPAIN	39.5	45.1	45.6	47.0	47.9	48.9
UNITED KINGDOM	26.4	24.8	25.5	24.1	23.9	24.8
OTHER WESTERN EUROPE						
AUSTRIA	51.1	51.9	52.5	52.7	52.8	52.8
FINLAND	32.4	32.5	31.8	32.8	33.1	33.4
SWEDEN	31.7	32.8	32.6	31.9	32.3	32.8
SWITZERLAND	42.8	42.2	41.9	40.6	39.7	39.7
EASTERN EUROPE						
BULGARIA	45.9	44.4	46.7	46.7	44.3	46.1
CZECHOSLOVAKIA	52.9	58.2	59.1	57.8	53.0	54.2
HUNGARY	88.4	80.3	88.5	69.4	66.9	52.6
POLAND	45.8	47.0	47.8	49.8	55.7	56.5
ROMANIA	32.7	30.8	17.7	29.4	25.2	24.0
YUGOSLAVIA	35.7	36.6	33.5	35.4	33.4	31.4
FORMER USSR	23.4	23.8	23.9	23.8	22.1	20.0
OTHER ASIA						
CHINA	16.9	18.4	19.1	20.2	21.1	20.8
HONG KONG	41.6	45.4	43.0	43.2	37.8	38.3
JAPAN	16.2	16.6	16.7	16.7	16.7	16.7
KOREA, REPUBLIC OF	11.1	12.5	13.8	12.7	12.6	13.6
TAIWAN	37.4	36.5	37.2	38.2	39.3	41.5
SINGAPORE	34.1	34.0	33.5	36.0	35.6	35.5
PHILIPPINES	8.1	8.6	9.5	10.1	10.2	10.2
OCEANIA						
AUSTRALIA	17.0	17.5	17.7	18.4	18.5	18.9
NEW ZEALAND	14.1	14.1	13.7	13.7	13.6	13.2

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.
POPULATION DATA FOR DERIVING PER CAPITA FIGURES WERE OBTAINED FROM ERS, USDA.
NOTES: SPAIN AND PORTUGAL JOINED THE EUROPEAN COMMUNITY IN 1986.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

PER CAPITA LAMB, MUTTON AND GOAT MEAT CONSUMPTION
SELECTED COUNTRIES

(IN KILOGRAMS, CARCASS-WEIGHT-EQUIVALENT)

	1987	1988	1989	1990	1991 PRELIM	1992 FORECAST
NORTH AMERICA						
MEXICO	0.9	0.9	1.0	1.0	1.0	1.0
UNITED STATES	0.7	0.7	0.7	0.8	0.8	0.7
SOUTH AMERICA						
ARGENTINA	2.4	2.5	2.8	2.5	2.3	2.3
URUGUAY	0.0	0.0	24.5	24.4	24.2	0.0
EUROPEAN COMMUNITY						
BELGIUM-LUXEMBOURG	1.8	1.8	1.8	1.9	1.8	1.8
DENMARK	0.8	0.8	1.0	1.0	1.0	1.0
FRANCE	4.4	4.5	4.9	5.5	5.6	5.8
GERMANY	0.8	0.8	0.9	1.0	0.9	0.9
GREECE	13.7	13.7	14.5	14.5	14.4	14.3
IRELAND	6.8	6.5	7.1	7.7	8.3	8.6
ITALY	1.6	1.7	1.8	1.8	1.8	1.9
NETHERLANDS	0.5	0.7	0.7	0.9	1.1	1.1
PORTUGAL	2.9	3.3	3.3	3.4	3.7	3.8
SPAIN	5.9	6.0	6.1	6.4	6.4	6.5
UNITED KINGDOM	6.3	6.7	6.9	7.2	7.1	7.0
EASTERN EUROPE						
BULGARIA	10.8	9.8	8.7	8.6	7.9	7.9
CZECHOSLOVAKIA	0.4	0.4	0.4	0.4	0.4	0.4
HUNGARY	0.2	0.2	0.2	0.2	0.2	0.2
POLAND	0.8	0.7	0.6	0.7	0.9	0.5
ROMANIA	0.8	0.7	0.9	3.8	3.4	3.1
YUGOSLAVIA	2.5	2.6	2.6	2.8	2.6	2.5
FORMER USSR	3.3	3.4	3.5	3.5	3.4	3.2
MIDDLE EAST						
SAUDI ARABIA	6.2	5.9	5.7	5.7	5.5	5.3
TURKEY	6.7	6.6	6.6	6.5	6.2	6.0
NORTH AFRICA						
EGYPT	1.7	1.6	1.6	1.6	1.5	1.4
OTHER AFRICA						
SOUTH AFRICA, REP OF	5.6	5.3	5.3	6.0	5.8	5.7
SOUTH ASIA						
INDIA	0.7	0.7	0.7	0.7	0.7	0.7
OTHER ASIA						
CHINA	0.7	0.7	0.9	1.0	1.0	1.0
JAPAN	1.2	1.3	1.2	1.0	1.0	1.0
KOREA, REPUBLIC OF	0.1	0.0	0.0	0.0	0.1	0.1
OCEANIA						
AUSTRALIA	23.9	22.0	22.9	22.7	21.5	22.7
NEW ZEALAND	35.6	27.8	24.7	23.4	24.8	22.6

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.
POPULATION DATA FOR DERIVING PER CAPITA FIGURES WERE OBTAINED FROM ERS, USDA.
NOTES: SPAIN AND PORTUGAL JOINED THE EUROPEAN COMMUNITY IN 1986.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BEEF

OVERVIEW

The world beef market experienced a year of change in 1991. Japan abolished its import quota system, liberalizing its beef market. The aftermath of German unification and cuts in European Community (EC) milk quotas significantly increased both beef production and intervention stock levels in the EC.

In the United States, record high beef prices in the first half of 1991 dramatically dropped during the summer as record total meat supplies and a weakening economy weighed on prices. Per capita red meat and poultry consumption, which had averaged 210 pounds (lbs) in 1988-90, moved up dramatically in 1991 to 215 lbs. U.S. beef imports subject to the law were held down by the trigger level under the Meat Import Act.

World beef production estimates for 1991 and forecasts for 1992 have been revised downward. In 1992, world beef production is projected to drop to 47.9 million tons from a revised 48.3 million tons in 1991. Production in the United States is expected to continue a modest expansionary trend, rising nearly 2 percent in 1992, with increased fed and cow beef production. However, beef and veal production in the EC in 1992 is forecast to fall 4 percent, back to below 1990 levels. In Australia, improved pasture conditions are expected to result in heavier carcass weights and help boost production. In the newly independent states of the former USSR, beef production is expected to continue to drop due to political and economic disruptions and poor forage supplies. The situation in Brazil is not clear, with Government imports of beef in 1991 sending mixed price signals to cattle producers. Beef production is forecast to increase slightly in 1992.

UNITED STATES -- EXPORTS THRIVE WHILE CATTLE EXPANSION REMAINS MODERATE

In 1991, U.S. beef and live cattle exports increased significantly over 1990 levels. U.S. imports of live cattle declined 9 percent in 1991, while beef imports increased 2.1 percent to 1,091,000 tons. U.S. beef production is expected to increase 2 percent in 1992, following a 1 percent increase in 1991. Production of both fed beef and cow beef are expected to rise in 1992.

U.S. beef exports showed substantial increases to three of the four major U.S. beef markets in 1991. U.S. beef exports to Mexico more that doubled from 33,078 tons in 1990 to a record 78,360 tons in 1991. In 1992, further increases to Mexico are expected as demand continues to grow. U.S. beef exports to Canada were significantly higher than expected, jumping 36 percent to 117,442 tons in 1991. The Korean market for U.S. beef continued to grow steadily, reaching 67,970 tons in 1991. Domestic demand in Korea continued to increase, and inflation rates remained high. U.S. beef exports to Japan fell slightly in 1991 due in part to high stock levels accumulated before the quota system was ended. However, the United States continues to gain market share with chilled beef products, the fastest growing segment of the Japanese beef market. Exports to Japan are expected to rebound in 1992 and continue their overall upward trend.

Japanese Total Beef and Beef Variety Meat Imports

Category	1988 MT	Mkt Share	1989 MT	Mkt Share	1990 MT	Mkt Share	1989 Percent	1990 Chan	Jan – Dec 1990 MT	Jan – Dec 1991 MT	% Change	Mkt Share
Chilled Beef Total (Quota)	78,810		118,427		151,099		50%	28%	151,099	171,376	13%	
United States	13,365	17%	22,808	19%	29,367	19%	71%	29%	29,367	44,445	51%	26%
Australia	63,988	81%	93,693	79%	119,618	79%	46%	28%	119,618	125,341	5%	73%
Frozen Beef Total (Quota)	184,737		230,269		225,033		25%	−2%	225,033	181,759	−19%	
United States	96,479	52%	126,746	55%	133,573	59%	31%	5%	133,573	110,404	−17%	61%
Australia	72,346	39%	82,873	36%	76,473	34%	15%	−8%	76,473	60,173	−21%	33%
Prep. and Pres. (Non−Quota)	20,337		26,395		26,784		30%	1%	26,784	23,844	−11%	
United States	9,849	48%	14,425	55%	17,929	67%	46%	24%	17,929	15,179	−15%	64%
Australia	8,344	41%	8,709	33%	4,533	17%	4%	−48%	4,533	3,305	−27%	14%
Diaphram (Non−Quota)	69,813		68,895		62,277		−1%	−10%	62,277	61,489	−1%	
United States	57,083	82%	55,828	81%	50,246	81%	−2%	−10%	50,246	50,479	0%	82%
Australia	6,893	10%	6,837	10%	7,687	12%	−1%	12%	7,687	7,729	1%	13%
Beef Total*	353,697		443,985		465,194		26%	5%	465,194	438,468	−6%	
United States	176,777	50%	219,806	50%	231,115	50%	24%	5%	231,115	220,507	−5%	50%
Australia	151,571	43%	192,111	43%	208,311	45%	27%	8%	208,311	196,549	−6%	45%
Variety Meats (Non−Quota)	35,037		35,219		39,429		1%	12%	39,429	47,735	21%	
United States	30,930	88%	32,030	91%	35,980	91%	4%	12%	35,980	41,131	14%	86%
Australia	2,385	7%	1,849	5%	2,381	6%	−23%	29%	2,381	4,476	88%	9%
Beef and Var. Meat Total	388,734		479,205		504,623		23%	5%	504,623	486,202	−4%	
United States	207,707	53%	251,837	53%	267,096	53%	21%	6%	267,096	261,638	−2%	54%
Australia	153,956	40%	193,960	40%	210,692	42%	26%	9%	210,692	201,025	−5%	41%

Source: Japanese Ministry of Finance

Mar−92

*Total beef imports include fresh, chilled, and frozen beef, prepared and preserved beef categories, and diaphragm beef, which is considered a variety meat by Japanese Customs.

In 1991, U.S. exports of live cattle increased to a record 311,000 head, with Canada and Mexico the primary markets. Exports to Mexico grew 227 percent to 210,000 head, and shipments to Canada were 88,000 head, more than double the 1990 level. Total U.S. cattle imports dropped from 2.1 million head in 1990 to 1.9 million in 1991. U.S. imports of Mexican feeder cattle dropped 18 percent to 1.03 million head, with further declines expected in 1992. U.S. imports of Canadian cattle increased from 874,000 head to 905,000 head in 1991. Large imports of Canadian slaughter cattle are expected to continue in 1992.

JAPAN -- BEEF IMPORT GROWTH LAUNCHED, ESPECIALLY CHILLED BEEF

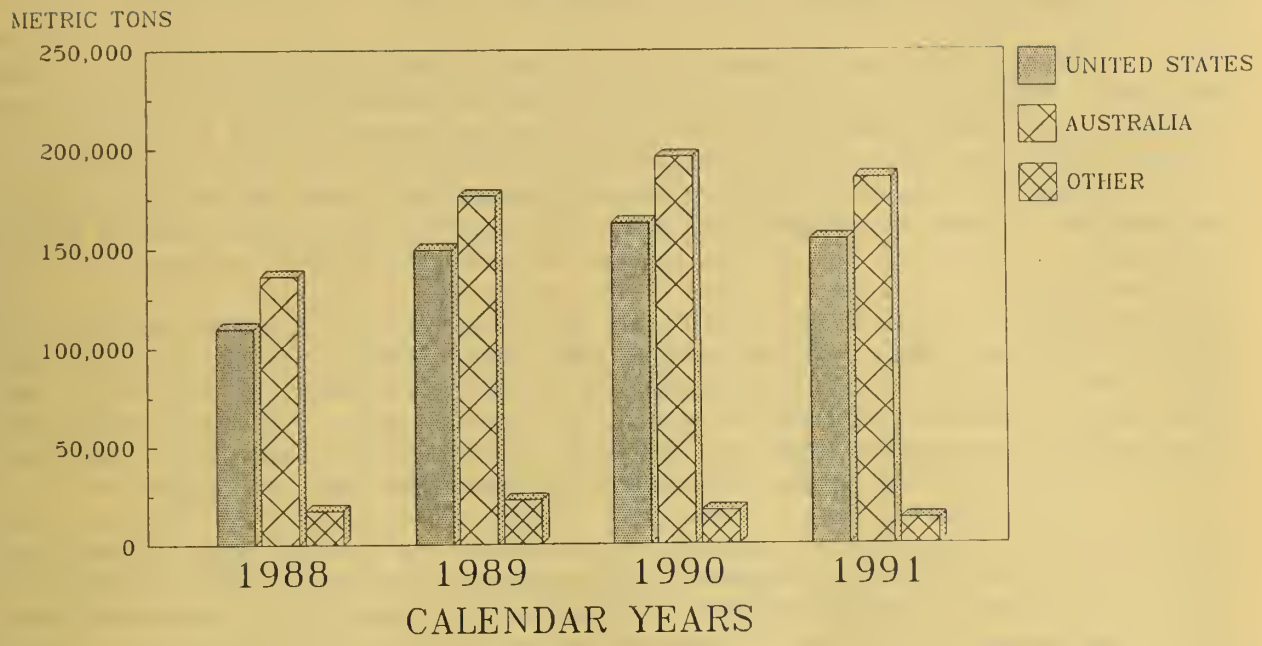
Since liberalization of the Japanese beef market in April 1991, the high stock levels of beef have dropped, and beef consumption has increased. At the same time, wholesale beef prices have dropped dramatically, while retail beef prices have edged lower. These events have contributed to an optimistic 1992 forecast for increased beef imports, following 1991's 7-percent decline in U.S. beef exports to Japan. The Japanese beef import estimate for 1992 is forecast at 580,000 tons (CWE).

Liberalization of the Japanese beef market has resulted in some shifting in the import pattern. Fewer frozen products are being imported, while imports of fresh and chilled beef have increased considerably. Consumption of chilled beef, which is increasingly popular among Japanese consumers, has risen sharply. The market share of chilled imported beef has grown from 30 percent to 50 percent. U.S. market share for chilled beef increased from 17 percent in 1988 to 19 percent in 1990 and 26 percent in 1991. Forecasts are for continuing increases in U.S. exports of chilled beef to Japan in 1992.

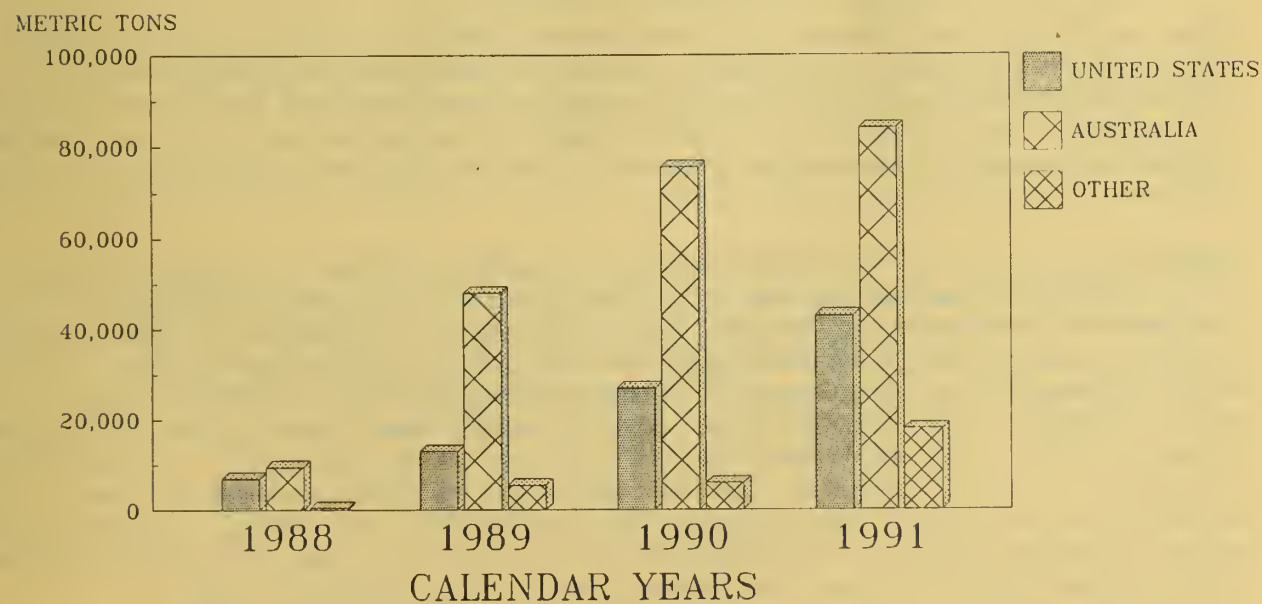
Since liberalization, Japan's wholesale prices for relatively low-quality domestic Holstein grass-fed carcasses have dropped dramatically. Oversupply of chilled Australian product (also lower quality grass-fed beef) has contributed to the wholesale price decline. While wholesale prices have risen for high-quality Wagyu beef, which is extremely popular, prices of Japan's medium-grade beef, which competes with imported U.S. beef in quality, have dropped. This indicates two clear consumer buying patterns -- those buying the high-quality beef and those buying the lower grade beef. The Ministry of Agriculture, Fisheries, and Forestry (MAFF) believes that the price differences will widen further in 1992 with the lowering of the tariff to 60 percent on April 1, 1992. Although retail prices are beginning to trend downward, the decline has not been as pronounced as the drop in wholesale price levels. The highest quality end of the beef market is expected to remain very expensive and lucrative to those able to meet exacting Japanese standards for quality beef.

Japan's per capita beef consumption is expected to continue its upward trend through 1992, increasing from 9.1 kilograms (kg) in 1991 to 9.6 kg for 1992. The majority of the increase will be met by imported product. The consumption estimate for 1992 has been revised upward to reflect vigorous demand, primarily from the food service industry. In 1980, Japanese per capita beef consumption equaled 4.4 kg and increased to 8.7 kg in 1990. While retail beef prices did not drop as much as expected in 1991, lower retail beef prices are expected to stimulate household beef consumption in 1992.

JAPAN
BEEF IMPORTS
1988 – 1991



KOREA
BEEF IMPORTS
1988 – 1991



Fresh, chilled, and frozen beef only, product weight.

Source: Japan – Japanese Ministry of Finance
Korea – Korean Government Statistics

While many indicators forecast an increasingly open and growing market, the Japanese beef market continues to be very competitive and uncertain at times. During the last quarter of 1991 there were rumors of MAFF officials pressuring Japanese importers to reduce beef imports. Australia and Canada have undertaken expanded promotional campaigns to advertise and educate the Japanese consumer and the food service industry about their beef products. The United States has been aggressively promoting beef in Japan since 1988.

There is also increasing evidence that Japanese investment in the beef industry overseas is growing, especially in the United States and Australia. Japanese investors have purchased ranches in U.S. western states, along with feedlots and processing plants in California and Washington State. The aim is to supply beef to the Japanese market in the form that is demanded. The remainder of the cuts are sold on the American market or exported to other countries. It is estimated that Japanese firms in the United States accounted for 15 to 20 percent of total U.S. beef exports to Japan in 1991. The situation is similar in Australia where Japanese firms accounted for approximately 23 percent of the beef exported to Japan in 1989 and almost 50 percent in 1991. Mitsubishi and the Japanese meat giant, Itoh Ham, both have operations in the United States and Australia and are expecting to increase production and exports to Japan in the next few years. Through a joint venture, Itoh Ham has also recently built a large feedlot in New Zealand solely for the purpose of exporting grain-fed beef to Japan.

Japanese beef production is expected to continue its upward trend through 1992, with the bulk of the increase centering on Wagyu beef because of continued strong prices and consumer demand. A plateau in production of lower quality beef is expected due to the reduced prices spurred by liberalization. However, since the last quarter of 1990, the Japanese Government has been providing deficiency payments for beef calves other than Wagyu, and more recently for dairy calves as well. These payments will slow the reduction in non-Wagyu beef production.

KOREA -- PRICE PRESSURES BOOST IMPORTS FURTHER

Korea was the fourth largest U.S. beef market in 1991. Growth has spiraled since the U.S.-Korea Beef Agreement of 1990. U.S. beef exports rose from a record $79 million and 21,500 tons (product weight) in 1989 to a new high of $177 million and 49,000 tons in 1991. The U.S. market share has also increased from an estimated 19 percent in 1989 to 30 percent in 1991, mainly at the expense of Australian grass-fed beef.

The United States has dominated the Korean market segment for grain-fed cuts under the Simultaneous Buy and Sell (SBS) system, accounting for almost 100 percent of Korea's SBS market and 70 percent of all grain-fed beef imports in 1991. Almost half of Korean beef imports are grain-fed beef. The United States has taken advantage of the growing demand for high-quality grain-fed beef by utilizing the ability to supply large quantities of individual grain fed cuts. The implementation in 1991 of the SBS system -- a 7-percent allocation of the base quota for the tourist/hotel trade and general use -- has allowed U.S. exporters direct access to three Korean end-users. In the general market segment, there are currently only two end-users, the National Livestock Cooperatives Federation and the Korean Cold Storage Company, both quasi-governmental agencies. Further development of the SBS system and future arrangements on beef access to Korea beyond 1992 will be the focus of bilateral negotiations due to commence before July 1992.

Rising demand for beef is being fueled by strong economic growth and increasing household incomes. When coupled with high retail prices, the growth in demand has pressured the Korean Government to allow beef imports at well above base quota levels. The base quota level for 1991 beef imports was originally set at 62,000 tons (boneless), but was increased during the year to 122,000 tons (boneless). Also, during the last few months of 1991, Koreans began importing beef under the 1992 quota. At the beginning of 1992, the Korean Economic Planning Bureau announced an initial import authorization of 132,000 tons (boneless), despite the Ministry of Agriculture, Fisheries, and Forestry's proposed level of 120,000 tons (boneless). Expectations are that the level will be raised further in 1992 to help dampen inflation. Consumer price escalation is a sensitive matter in this Korean presidential and congressional election year. In addition to the continuing effect of rising incomes on demand for beef, the elections themselves are expected to help fuel consumption through traditionally large campaign dinners.

In 1991, Korean calf production was significantly higher than expected, as most producers tried to rebuild or expand inventories to take advantage of high beef prices. Even with a large increase in beef imports, prices for Korean beef have continued their general upward trend. Liberal increases in the beef import quota may put some downward pressure on domestic slaughter prices in 1992, but many Korean agricultural experts believe that the market for imported beef can be kept largely separate from the market for domestically produced beef. This is supported by record high beef prices throughout 1991, despite a 25-percent increase in beef imports. As a result of high domestic beef prices, insemination rates in 1991 were again maximized (practically all breeding in Korea is done by artificial insemination), and 1992 calf production is expected to increase. The 1992 slaughter forecast assumes that increased demand for beef will continue to buoy up cattle prices despite an increase in imports, and that farmers across the board will continue to hold on to cows to expand their herds.

AUSTRALIA -- INCREASED CARCASS WEIGHT PUSHING UP BEEF OUTPUT, EXPORTS STRONG

Cattle numbers are estimated to remain close to current levels in 1992 at 25 million head. Lack of confidence in the Australian rural sector, poor seasonal conditions in some producing areas, and a lack of producer cash flow have all contributed to a low level of herd building. Beef and veal production is forecast to increase around 1 percent during 1992 despite a fall in total slaughter. More normal seasonal conditions are expected to result in increased carcass weights over 1991 levels.

Australian exports of beef and veal in 1992 are forecast to remain close to the 1991 level. However, the volumes exported to major destinations are forecast to change. Exports to Japan and other North Asian markets, particularly Korea, are expected to increase in 1992, while exports to the United States are estimated to decrease. Voluntary Restraint Agreements were negotiated under the U.S. Meat Import Act, limiting U.S. imports from Australia to 337,155 tons in 1991.

NEW ZEALAND -- BEEF PRODUCTION AND TRADE EXPECTED TO GROW

Beef inventories and production will continue their upward trend in 1992. Cattle numbers are up for 1992, with a steady increase in breeding cow inventories on both dairy and beef farms. The beef herd continues to grow through high dairy calf retentions, which are encouraged by high domestic beef prices and lower prices for milk and lamb. Slaughter numbers are expected to rise 3 percent in 1992 reflecting the increased retention of dairy calves from the previous years. Climatic conditions have been better than expected, which may translate into higher slaughter weights. Beef exports are expected to increase 3 percent in 1992, in line with the 3-percent production increase. The United States is expected to continue to take 75 percent of all New Zealand beef exports in 1992. Korea is becoming an important destination for New Zealand beef, which accounted for more than 10 ten percent of Korean beef imports in 1991.

New Zealand beef exporters had appeared to be focusing more on the Korean market and less on the Japanese market as their market share in Japan declined in 1990 and 1991. However, a joint venture between a subsidiary of the New Zealand Meat Producers Board and Itoh Ham, a major distributor of meat in Japan, has developed New Zealand's first major feedlot. The new feedlot began operation in August 1991 with a feeding capacity that will be expanded to 15,000 head in a couple of years from the current 10,000 head. At capacity, this would increase New Zealand's exports to Japan nearly 70 percent to 20,000 tons. The percentage increase in value would be substantially greater, as the high-quality beef would bring a much higher price than the grass-fed beef now being shipped. The modern feedlot represents a major investment by the joint venture partners and a major commitment to the Japanese market.

FORMER SOVIET UNION -- CONSUMPTION EXPECTED TO NOSE-DIVE IN FUTURE

As with the rest of Soviet agriculture, beef production has been sharply reduced by the gradual dissolution of the communal farm system. Preliminary numbers show that 1991 production of 8.2 million tons (CWE) was down 7 percent from the levels of 1990 and 1989. Estimates for 1992 show another 6-percent drop to 7.7 million tons. This drop parallels a reduced slaughter weight, pulled down by poor forage supplies and inefficiencies in production.

Beef imports appear to have increased in 1991, although accurate data is difficult to obtain given the current situation. Conservative estimates show an increase of 150,000 tons over the 250,000 tons of beef imported in 1990, but the 1991 number could be significantly higher. The EC, by the far the most important supplier, shipped 200,000 tons through the first three quarters of 1991, and reports of continued EC aid indicate this supply held up through the last quarter. With EC stocks high, it seems likely that the newly independent states of the former Soviet Union will continue to receive EC beef on very favorable terms over the short run. In 1992, combined imports should increase to at least 430,000 tons.

For 1993 and beyond, the beef industry in the newly independent states will continue to see big changes. Analysts tend to agree that the former Soviet system of consumer prices greatly underestimated the production cost of meat vis-a-vis other consumer goods. One indication of this is per capita meat consumption, which under the precious system was reported to be well above per capita levels of free market economies with similar incomes. As the newly independent states of the former Soviet Union develop free market economies, the price of meat will undoubtedly go up with respect to other goods. This should result in continued significant reductions of beef consumption and production in the medium term. However, since it has been so long since a market economy has operated in these states, it is difficult to say how the introduction of free markets will affect trade. These new states could well be net exporters or importers of beef, depending on how their markets develop.

EUROPEAN COMMUNITY -- STOCK BUILDUP SET TO REVERSE IN 1992

The combined effects of increased production, stagnant consumer demand, and a disruption in traditional export markets led to a build-up in (EC) beef intervention stocks. Stocks approached 1 million MT by the end of 1991. This surpassed the previous record of 954,000 tons set in 1987. Slightly lower production and a return of some of the traditional export markets should bring about a moderate decline in 1992 stocks. Consumption is expected to remain stagnant through 1992.

The higher production numbers in 1991 came from a sharp rise in dairy cow cullings and an increase in the slaughter of heifers. Including eastern Germany, cow cullings in 1991 increased by over 400,000 head, while heifer slaughter rose by 300,000 head. These increases represent approximately 200,000 tons of beef. Although cows and heifers are not eligible for intervention, the increased production depressed beef prices. This, in turn, helped lead to the record-level intervention purchases. With cow and heifer cullings expected to return to more normal levels in 1992, overall beef production should return to 1990 levels.

Despite the disruption of traditional export markets, total EC beef exports (excluding intra-trade) actually increased by 21 percent in 1991 to about 1.3 million tons. The embargo on Iraq and concerns over Bovine Spongiform Encephalopathy (BSE) continued to hurt EC exports to the traditional markets in the Middle East. However, this was more than offset by large-scale exports to Brazil and the newly independent states of the former Soviet Union.

Ireland, which traditionally exports nearly 90 percent of total production, was especially hard hit by the disruption of exports to the Middle East. In addition to losing the Iraqi market, Ireland faced a ban on its beef exports to Iran, Algeria, and Libya due to concerns over BSE. The situation should ease in 1992, however, as all three countries have lifted their ban on Irish beef. In addition, Ireland is expected to be a major player this year in beef exports to Russia and the other states in the former Soviet Union.

MEXICO -- RISING PRICES LIKELY TO PUSH CATTLE IMPORTS LOWER, U.S. BEEF EXPORTS STILL SOARING

Mexico continued as the largest export market for U.S. live cattle and was the third largest export market for U.S. beef in 1991. In 1991, U.S. cattle and beef exports to Mexico reached record levels of 210,000 head and 87,000 tons (CWE), respectively. The upward trend for beef exports is expected to continue in 1992. However, U.S. live cattle exports are expected to drop in 1992 as Mexican cattle supplies increase and U.S. beef prices recover. Beef and variety meat consumption is expected to increase due to strong economic growth, a gradual recovery of consumer purchasing power, and continued population growth. Since late 1991, ample supplies of U.S. beef have been available at prices lower than Mexican beef. U.S. boxed beef is consumed by middle and upper income consumers and is gaining market share at supermarket chains, hotels and restaurants in Mexico. Some reports indicated that Mexican consumers prefer the taste and quality of U.S. beef over domestic beef on beef imported from the EC.

During the last half of 1991, many Mexican slaughter houses found U.S. live cattle prices attractive. These slaughter houses were more profitable because of less expensive labor and an ability to market the entire animal (carcass, offals, hides, etc.) to the local trade. If U.S. prices for slaughter cattle increase in 1992, Mexican imports of U.S. cattle are expected to decline. However, sales of U.S. beef breeding stock have increased and are expected to continue as Mexican ranchers seek to expand herd size and improve genetic quality.

Following several years of record high cattle exports to the United States, Mexican feeder steer exports are expected to drop for the second consecutive year in 1992, down to 1 million head. This is approximately 260,000 head less than was exported to the United States in 1990. The decline in cattle exports is due to increased domestic demand for beef and to ranchers attempting to rebuild herds.

In 1992, for the first time since 1989, beef production in Mexico is expected to increase after suffering significant declines from severe consecutive droughts in 1988 through 1990, and record high exports of feeder cattle to the United States in 1989 and 1990. Favorable weather and abundant forage existed in almost all the major cattle producing states in the latter half of 1991 and should continue through 1992. In addition, with recent changes in land and agrarian policies, Mexican cattlemen have gained new rights, which will provide incentives to expand herds and increase beef production.

CHINA -- BEEF PRODUCTION AND EXPORTS ON THE RISE

China's production of beef continues to show significant gains in response to increased demands by consumers and efforts to develop export markets. In 1992, production is expected to increase 20 percent over 1990 production. With Government programs and funding directed at developing pasture areas and improving livestock production in agricultural areas, beef production is expected to continue to climb. Production on a per capita basis has expanded from 0.55 kg in 1986 to an estimated 1.18 kg in 1991. Considering the size and rate of growth of China's population, the gains in beef production are particularly impressive. However, not all of these production gains are being made available to the Chinese consumer; a significant portion of the production increases are being channeled into export markets.

Exports of Chinese beef, particularly value-added canned beef, are growing and will likely continue to do so as more new processing facilities come on line. Also, all joint venture operations are required to export a portion of their output each year. In 1991, Chinese beef exports jumped to 219,000 tons (CWE) 155,000 tons in 1990. China exported 105,000 tons of fresh, chilled, and frozen beef and 44,000 tons of canned beef to the newly independent states of the former Soviet Union in 1991. This represents 68 percent of total exports. Iran and Hong Kong were the next largest fresh, chilled, and frozen markets, taking 12,600 tons and 10,400 tons, respectively. In addition to the states of the former Soviet Union and Hong Kong, Japan is expected to be a growing market for Chinese beef. For example, Hanamasa, a Tokyo-based chain of discount meat stores and grill restaurants, is starting to import canned processed beef from China to replace current imports of beef from Brazil and Argentina. This reflects the type of market where Chinese beef, particularly canned beef, can best compete. The breakup of the Soviet Union did not appear to affect fourth quarter exports of beef to the newly independent states, and it is likely that trade will increase even further in 1992 as China has been quick to recognize the now-independent nations on its borders. Reportedly, several barter arrangements have already been worked out for 1992. In 1992, beef exports are expected to increase by 14 percent over 1991 exports, with canned beef remaining a significant share of those exports.

Chinese exports of live cattle in 1991 dropped to 173,000 head, down from 1990 levels of 200,000 head; however, this is likely a short-term phenomenon related to the 1991 summer floods. In 1991, export numbers to Hong Kong were down, although 151,000 head were exported. There was a sharp increase in exports to the newly independent states of the former USSR from 42 to 13,500 head.

For example, through a barter agreement between the newly independent state of Kazahkstan and the Chinese province of Xinjiang, the province agreed to provide 10,000 head of beef cattle in exchange for fertilizer and processing machinery designed for livestock products. In 1992, China's total live cattle exports are forecast to return to 1990 levels of 200,000 head. The Japanese market may become more important as a destination for live cattle, as a major Japanese meat processor is planning to produce beef calves (using a common Chinese breed) in a joint venture food manufacturing company. The Japanese processor plans to begin shipping calves to Japan in the spring of 1992 and is expecting to expand the operation to a herd of 10,000 head. In 1991, Chinese cattle exports to Japan totaled 519 head.

Although China's overall imports of beef have been decreasing, there is continued significant demand for high-quality beef. The hotel trade, in particular, is a major focal point for the high-quality end of the beef trade that cannot be serviced by domestically produced beef. The demand for high-quality fresh beef will continue to be met by imports. However, expansion of this trade is hampered by the costs imposed by China's highly regulated trade regime. If trade barriers can be successfully reduced or eliminated, high-quality imported beef will likely find a ready market with the increasingly affluent Chinese consumer. As a way around the barriers, at least one group is setting up a special production facility to produce beef, primarily veal, for the hotel trade in Shanghai. Recent reports also describe a Canadian joint venture that will use imported Canadian cattle, raised under exacting conditions to produce beef for the joint-venture hotels.

In general, the beef trade is inhibited by the regulations of China's trading system, primarily the requirement for an import license. Also, all trade is transshipped through Hong Kong, where the middlemen reportedly tend to provide the Hong Kong trade with the best portions. This makes it difficult for the importers in China to secure the specific cut and quality that is desired. The import licensing requirements and general nontransparency of the trade requirements restrict access to the market. However, the relatively low per capita consumption of beef, coupled with rising incomes, indicates that China's domestic beef consumption has the potential to increase. Domestic production, which is currently best suited for the middle to low end of the quality scale, will not be able to compare on a quality basis with imported beef. The planned opening of the first McDonald's in Beijing may make a significant contribution to increasing the popularity of beef among Chinese consumers by providing what will likely be an affordable, high-volume outlet for beef.

SWINE AND PORK

OVERVIEW

World pork production in 1992 is expected to increase slightly. Total production in 1992 is projected at 64.6 million metric tons, compared with 64.4 million tons in 1991. Increased production in countries such as Taiwan, Poland, and the United States is expected to offset declines in Germany, Hungary, and Japan. Other major areas of production, including China, Denmark, the Netherlands, and Czechoslovakia are expected to approach last year's level of production.

Total exports (excluding EC intra-trade) are expected to match last year's level of 2.1 million tons. Major producers expected to show increases in exports include Taiwan, China, Canada, and the United States. Hungary and the EC are expected to show significant declines. The projected drop in EC exports is due mainly to lower Danish exports to the United States and the expected cessation of eastern German exports into the former Soviet Union. Japan, the United States, and the former Soviet Union will continue to be the largest import markets, with each showing increases in 1992.

UNITED STATES -- GROWTH IN PRODUCTION CONTINUES

Pork production in the United States is expanding. Total production in 1992 is expected to increase 7 percent to a record 7.8 million tons, up from 7.3 million in 1991 and surpassing the previous high of 7.6 million tons set in 1980. Hog prices continue to decline, primarily due to large supplies of pork and competition from other meats, especially beef and poultry.

U.S. imports of pork in 1992 are expected to increase slightly to 354,000 tons, compared with 352,000 tons in 1991. Imports from Canada are expected to increase due to the countervailing duty on live hogs and increased Canadian production, while imports from Denmark and Poland may decline. U.S. exports should increase in 1992, reflecting lower prices and a favorable exchange rate. Major markets will continue to be Japan and Mexico, which accounted for 75 percent of total U.S. exports in 1991.

JAPAN -- DOMESTIC PRODUCTION SLUMPS AND IMPORTS SHOW STRONG GAINS

The pork sector in Japan is currently going through a significant transition. Domestic production is on a long-term downward trend, with significant structural shifts in farm size. At the same time, imports are up and changes in market share appear likely. Also, consumers are switching from hams to less expensive sausages and bacon.

In terms of production, pork producers are facing difficult times due to higher feed costs and environmental concerns. This is forcing out not only the smaller producers but medium-sized producers as well. The number of farms producing hogs is expected to decline to 30,000 in 1992 from 36,000 in 1991. This contraction in domestic production is expected to continue at least through 1994. For 1992, slaughter is expected to drop to 19.5 million head, compared with 20 million in 1991 and 20.9 million in 1990.

The decline in domestic production has resulted in significantly higher pork imports. Total imports are expected to reach 615,000 tons in 1992, compared 565,000 tons in 1991 and 488,000 tons in 1990. Imports now account for nearly 27 percent of the total Japanese market, up from 20 percent in 1985. Taiwan will remain the largest supplier, despite the interruption of its exports through the port of Nagoya. Taiwanese and Japanese analysts, however, expect Taiwan to face stiffer competition in the Japanese market in the near future from Denmark, the Netherlands, and the United States. The Netherlands is expected to gain approval to export to Japan in April, with product reaching the market by the end of the year.

CHINA -- PRODUCTION STABILIZES AS EXPORTS PUSH UP

Pork production is forecast to show only slight growth in 1992 as slaughter numbers are not expected to be much higher than in 1991. Slow growth in slaughter numbers reflects the fact that swine inventory levels are expected to be virtually unchanged in 1992. This is due to several factors: floods in the middle of 1991 that reportedly destroyed as many as 4 million head; the decline in prices during 1990 that may have encouraged the exit of many small-scale producers; and Government policies that have encouraged the stabilization of hog numbers.

Exports of pork are expected to increase to 300,000 tons in 1992, up from 278,000 tons in 1991 and 235,000 tons in 1990. In China, pork exports are divided into two categories: fresh, frozen, and chilled; and canned. In 1991, canned exports accounted for 162,000 tons or 58 percent of the total, while fresh, frozen, and chilled accounted for 116,000 tons or 42 percent of the total. The newly independent states of the former Soviet Union and Hong Kong remained the largest markets for fresh, frozen, and chilled pork exports, importing 63,000 tons and 41,000 tons, respectively, in 1991.

TAIWAN

Despite the authority's intention to cut hog production by 26 percent within 6 years, preliminary statistics show a record-high 13.4 million hogs slaughtered in 1991. This represents an 11-percent increase over the 1990 level of 12.1 million head. For 1992, total hog slaughter is projected to increase another 8 percent to 14.5 million head as inventory remains at record-high levels. A recent Government survey indicates that year-end inventory levels were up 18 percent from year-ago levels. Strong hog prices supported by increased pork exports were the main stimulant for production.

In response to environmental concerns, Taiwan's official hog production policy had been to convert from an export-oriented market to one that only meets domestic demand. Farmers are reluctant to implement the policy, however, as long as prices are high and hog production remains profitable. More recent actions by Taiwanese officials indicate that this no-export policy is softening. Officials now say that export-oriented production is fine as long as it meets the environmental standards.

Of the 13.4 million hogs slaughtered in 1991, approximately 43 percent or 5.7 million head were slaughtered for the Japanese market. Taiwanese pork is price competitive in the Japanese market and has a geographical advantage for supplying the fresh and chilled market. The recent suspension of five Japanese importers at the port of Nagoya caused some speculation that Taiwanese exports to Japan would decline. However, Taiwanese officials and exporters both feel there will be little impact on total exports, as trade with other importers and at other ports has been unaffected.

CANADA -- PORK PRODUCTION AND EXPORTS FORECAST TO REBOUND IN 1992

Total Canadian pork exports dropped from 314,000 tons in 1990 to 275,000 tons in 1991. However, exports this year are expected to recover to 1990 levels, a result of the moderate increase in Canada's breeding herd during 1991 and more competitive export prices. Early improvements in market prices in 1992 suggest a modest upward trend for the remainder of the year. Despite this expected price improvement at home, Canadian exports to the United States are expected to increase in 1992 due to the combined effect of the increased countervailing duty (CVD) on live hogs and the removal of the CVD on Canadian pork.

Canadian pork production remained constant at 1.13 million tons in 1991. During the first half of 1991, production declined about 5 percent due in part to herd expansion. However, the larger inventory and increased farrowings of pigs destined for slaughter in the latter part of the year offset the earlier shortfall. In 1992, larger hog inventories are expected to increase pork output. Pork production is projected at 1.14 million tons in 1992. Meanwhile, live hog exports to the United States remained at high levels, totaling 1.1 million head in 1991. This figure is predicted to decline in 1992, however, due to increased domestic demand and the increase in the U.S. countervailing duty on incoming slaughter hogs.

NETHERLANDS -- RECOVERY FROM MYSTERY SWINE DISEASE FORECAST

The Dutch swine industry was hit hard by the Mysterious Swine Disease (MSD) in 1991. Swine production declined from 30 million head in 1990 to 27 million in 1991. Over the same period, swine exports declined nearly 30 percent, from 4.4 million head to 3.1 million head. Most of the impact of the disease on slaughter numbers was largely felt during the last half of 1991, with some lesser impact through the first quarter of 1992. Total annual production, however, is expected to recover from 27 million head in 1991 to 29 million head by the end of 1992. At the same time, exports are expected to improve modestly to 3.5 million head.

DENMARK -- SIGHTS SET ON EXPANDED EC EXPORTS

In 1991, Danish pork producers increased their EC intra-trade while reducing their dependence on the more volatile non-EC markets. Swine meat exports to EC countries grew from 540,000 tons in 1990 to 600,000 tons in 1991, while non-EC exports declined from 332,000 tons to 322,000 tons over the same period. In 1992, pork exports to Japan--Denmark's largest non-European market--are expected to remain firm, while exports to the United States could decline. Intra-trade exports are set for continued expansion through the mid-1990's.

Live hog exports exploded in 1991 because of the low number of piglets in the Netherlands and Germany, a result of the incidence of MSD. In 1990, total exports were 9,000 head, while 239,000 head were marketed abroad in 1991. Along with increased exports, live hog inventories continued to expand in 1991. Beginning stocks grew from 9.1 million head in 1990 to 9.3 million in 1991. Herd numbers are predicted to jump to 9.8 million head in 1992, supported by continued price declines for feedstuffs.

GERMANY -- SWINE INVENTORY STABILIZATION EXPECTED

Germany's hog inventories declined sharply in 1991. This was largely due to the drastic herd cutback during restructuring in eastern Germany and, to a much lesser extent, to the presence of MSD in western Germany. Beginning stocks diminished from 34 million head in 1990 to 31 million in 1991, and are estimated to have dropped further to 26 million head for 1992. Total pork production declined 15 percent from 3.9 million tons to 3.3 million in 1991. A further decline to 3.2 million tons is projected for 1992.

With the anticipated drop in herd numbers and pork production, hog prices are expected to remain firm through the beginning of 1992. Any significant improvement in producer profitability is not expected to increase herd numbers, however, as producers are likely to wait and see how swine inventories stabilize in eastern Germany.

EASTERN EUROPE AND THE FORMER SOVIET UNION -- HERD RESTRUCTURING CONTINUES

The dissolution of communism is having a dramatic effect on hog inventories in the former Eastern Bloc. Almost all of these countries are experiencing drops in animal numbers as they switch from centrally planned to market economies. Producers are seeing prices for inputs rise and consumer demand fall as retail prices increase and incomes decrease. The hog population in the newly independent states of the former Soviet Union has dropped from 78 million head in 1988 to an estimated 73 million head in 1992. In Eastern Europe, the numbers have fallen from 61 million head to 58 million over the same period.

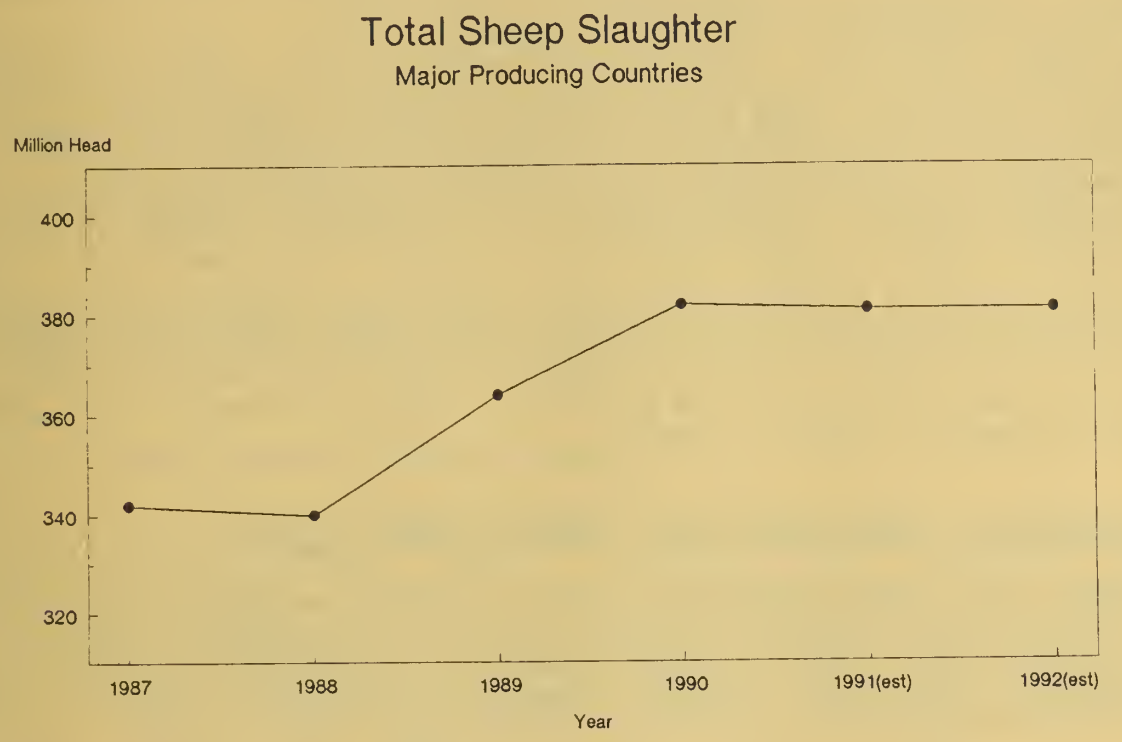
Pork production has likewise dropped in the newly independent states of the former Soviet Union, from 6.7 million tons in 1989 to a predicted 5.6 million tons (CWE) in 1992. However, pork production has stayed relatively flat in Eastern Europe because of slaughter of excess stock and the current strength of the Polish industry. Poland had excess stocks of grain and potatoes in 1990 after it stopped supplying feed to the Soviet Union, and this has allowed producers to step up production for the past few years. Recently, however, hog prices have fallen, and expectations are that Polish farmers will begin reducing their inventories.

Eastern Europe has experienced a decline in exports over recent years as export subsidies decline. At the same time, the Soviet Union and the institutions succeeding it have tried to compensate for drops in domestic production by increasing imports. Soviet imports rose from 220,000 tons in 1989 to at least 320,000 tons in 1991, and the new states are expected to import at least 350,000 tons in 1992. With old sources in Eastern Europe becoming less accessible, the Soviet Union increasingly turned to China for pork imports, and the newly independent states will probably continue this trend in 1992.

SHEEP AND GOATS

OVERVIEW

World sheep meat production in 1991 was still well above levels of the late 1980's, as producers continued to slaughter their wool-producing stock in response to the collapse of wool prices in 1989. The world sheep population declined from 880 million in 1991 to about 850 million in 1992. In 1992, meat production is expected to continue at the level of recent years. Intra-EC trade continues to grow with the help of reduced payments in the United Kingdom, while combined exports from the two biggest players, Australia and New Zealand, remain stuck at about 700,000 tons.



Source: DLP/FAS/USDA

UNITED STATES -- LIVE EXPORTS TO MEXICO SURGE AS INVENTORY SHRINKS

The United States produced about 165,000 tons (CWE) of lamb and mutton in 1991, little changed from 1990's output. Imports were about 27,000 tons (CWE), also little changed from 1990. While meat exports were negligible, exports of live sheep, mostly for slaughter, were up sharply to Mexico. The United States shipped almost 780,000 sheep to Mexico in 1991, as compared to only 430,000 in 1990. This continues a long-term upward trend, but an average 17-percent drop in live sheep prices led to a particularly large jump in 1991 exports.

Exports to Mexico likely played a big part in declines in the U.S. sheep inventory. The sheep population on January 1, 1992, was estimated at 10.9 million head, down 3 percent from the year-earlier level. Projections for 1992 are for about a 1-percent increase in meat production.

NEW ZEALAND -- FLOCK STABILIZES BUT NO GROWTH LIKELY

Sheep inventories appear to be stabilizing at about 58 million head after years of decline. The live sheep and lamb trade to the Middle East was a record 1.7 million head in the 1990/91 marketing year (July/June), and appears to be strong again this year. Both sheep and lamb slaughter rates were down in the 1990/91 season. For 1991/1992, a decrease in mature sheep kill but an increase in lamb kill is anticipated. As a result, New Zealand's total production for this meat marketing year (Oct./Sept.) should be little changed from last year's 529,000 tons (CWE), with exports likely to be flat as well. There has been a slight pickup in lamb prices in recent weeks, but sheep producers face continued poor earnings in the short term from both lamb and wool operations.

AUSTRALIA -- SLAUGHTERINGS OF WOOL STOCK TO PEAK IN 1992

The Australian sheep flock is continuing to be downsized following the 1989 collapse of wool prices. The flock should be reduced by another 9 percent this year in line with the Australian Wool Corporation's flock reduction scheme. This likely will result in about a 2-percent increase in mutton production. However, mutton production should peak in 1992 and decrease through 1995 as the wool flock approaches a more desired level.

Drops in the value of the Australian dollar, and renewed demand in the Middle East following the Gulf War, should increase lamb exports about 3 percent in 1992. Lesser increases in domestic demand will lead to a 1-percent overall increase in lamb production. Lamb production levels in the medium term appear likely to remain near the 1992 level.

UNITED KINGDOM -- INVENTORIES STABLE, EXPORTS POISED TO JUMP

The report showing the December inventories is not yet available, but the size of the British sheep flock does not appear to have changed much in 1991. Depressed prices in the United Kingdom resulted in a brisk export trade to other EC countries in live sheep. Initial estimates show exports to other EC countries up over 50 percent in 1991 to approximately 800,000 head.

Mutton and lamb production rose 5 percent, but domestic consumption fell marginally. The increases in production were offset by higher exports and a decline in imports. The removal of the variable premium in Great Britain (essentially a deficiency payment peculiar to Britain) at the end of 1991 with the associated removal of the clawback (an export tax that compensates for the price advantage the variable premium afforded UK producers vis-a-vis other EC countries) is expected to encourage exports of sheep meat from Britain in the future. Clawback accounted for a third of the export price of British sheep meat in 1991. Aided by the price cut, 1992 exports are forecast to increase 20 percent to 95,000 tons. If the trade follows past trends, the increased exports will be restricted almost exclusively to the EC, in particular France, which has in the past accounted for two-thirds of Britain's trade.

IRELAND -- CAMPAIGN NUDGES DOMESTIC CONSUMPTION UP, EXPORTS FACING COMPETITION

While sheep numbers continue to grow, the rate of increase slowed last year and flock size could peak by the end of 1992. Domestic sheep meat consumption increased for a second year in 1991, benefiting from a consumer promotional campaign, competitive prices, and the bad publicity surrounding BSE and growth promoter abuse in the beef industry. However, Government analysts expect more difficult market conditions for producers this year because of increased U.K. competition in the French market, Ireland's principal export outlet, as the U.K. phases out its variable premium on sheep meat.

FRANCE -- MEAT IMPORT PRICES DOWN, LIVE EXPORTS UP

French mutton and lamb imports increased from 126,000 tons (CWE) in 1990 to 136,000 tons in 1991. France's main source of imports continues to be Ireland and the U.K. with about 40,000 tons each, although imports of frozen sheep meat from New Zealand nearly doubled during the first 9 months of 1991 to 10,000 tons. Because Britain has abolished its variable premium and associated export tax on sheep meat, French market prices in 1992 could be 10 percent below year-earlier levels, and imports up 7 percent over 1991. Domestic production should stay at the 190,000-ton level of the last couple of years. French exports of live animals to Italy and Spain should continue strong in 1992, as producers in those countries find it more efficient to import lambs for feed and slaughter rather than produce them locally.

SPAIN -- IMPORTS OF LIVE SHEEP REMAIN STRONG

Spain's sheep flock shrank more than 5 percent between the 1990 and 1991 censuses. However, imports of live animals and slaughter of breeding stock appear to have led to a slight gain in meat production in 1991. The Spanish flock may have expanded too quickly in the late 1980's, and now some producers are reducing breeding stocks and relying instead on imports for feed and slaughter to meet local demand. For 1992, imports of live animals should continue to be strong and the flock size should stabilize, resulting in a 1- or 2-percent increase in meat production to about 245,000 ton (CWE).

EASTERN EUROPE AND FORMER SOVIET UNION -- FLOCK NUMBERS CONTINUE TO PLUMMET

The collapse of communism has brought confusion to formerly state-controlled sheep operations in eastern Europe. Although some of this decline is being compensated for by an emerging private sector, the sheep population has declined throughout the former Eastern Bloc. In what was the Soviet Union, flock size has fallen from close to 141 million to an estimated 128 million over the last 3 years. Lamb and mutton production dropped from 1.0 million tons (CWE) in 1990 to 965,000 tons in 1991 and will likely fall by another 6-7 percent in 1992. Increased imports have compensated for only a fraction of the lost production.

In Romania, the flock fell from 19 million head in 1988 to approximately 14 million in 1991. Meat production shot up during this time on increased slaughterings, and output will continue to be above former levels for some time, although Romania exports, which only a few years ago were around 50,000 tons annually, have now all but disappeared. The story is similar to Romania's for the smaller flocks of Bulgaria, Hungary, and Poland, all of which have decreased by at least 20 percent. Only the flocks of Czechoslovakia and Yugoslavia have remained close to the levels of the late 1980's, although both have shown small declines.

CHINA -- DOMESTIC WOOL AND MEAT DEMAND SUSTAINS PRODUCTION

The Chinese sheep population grew quickly when wool prices were high. Unlike other wool-producing countries, however, the sheep flock has not shrunk after the collapse in wool prices, although it is not growing as it was before. In 1991, the Chinese flock numbered 210 million, little changed from 1990, although well above the 166 million head of 1987. Predictions are that the flock will be only slightly smaller in 1992 at 208 million. The Chinese sheep industry continues to be healthy partly because of the vitality of the Chinese textile industry, and partly because of increases in demand for sheep meat. Meat production increased at least 4 percent in 1991 and is forecast to increase another 6 percent in 1992 to 1.2 million tons (CWE). This will make China the world's largest producer, nearly matching the combined EC's total. The closed domestic market consumes virtually all of the meat output.

MEXICO -- NEW VENTURE STARTED

A private company is importing Australian breeder sheep in hopes of significantly increasing Mexico's relatively small sheep industry. The company began landing the sheep in mid-February and expects to eventually import 70,000-80,000 head, most of which are ewes 2 to 3 months pregnant. The new sheep are of the Coopworth breed, which is suitable for producing mutton and a medium-quality wool. Producers hope that if the new breed is suitable for Mexico, they can import more sheep and eventually export meat to the United States.

Currently, Mexico produces about 80,000 tons of sheep meat annually and imports another 10,000 to 15,000 tons. However, Mexican producers import large numbers of live animals from the United States as feeders and for slaughter. Last year, the industry brought in almost 780,000 head. If this new Mexican venture is successful, it could lead to significant changes in the current structure of Mexican sheep production.

HIDES AND SKINS

OVERVIEW

World hides and skins production increased about 35,000 tons in 1991 compared to 1990 mostly on the strength of increased cattle slaughter in Turkey and the newly independent states of the former Soviet Union. Hides and skins production in 1992 is projected to decline slightly by about 9,000 tons from the 1991 quantity because of reduced cattle slaughter in Western and Eastern Europe, and the newly independent states of the former Soviet Union.

The major hides and skins buying countries, and particularly Eastern Europe, reduced overall purchases in 1990 compared to 1989. Even though the European Community (EC) reduced purchases in 1991, Mexico and Korea increased purchases to offset the EC reduction. Nevertheless, the major buying and processing countries are projected to marginally reduce purchases in 1992 as world cattle slaughter declines and finished products incur sales apathy from countries in recession.

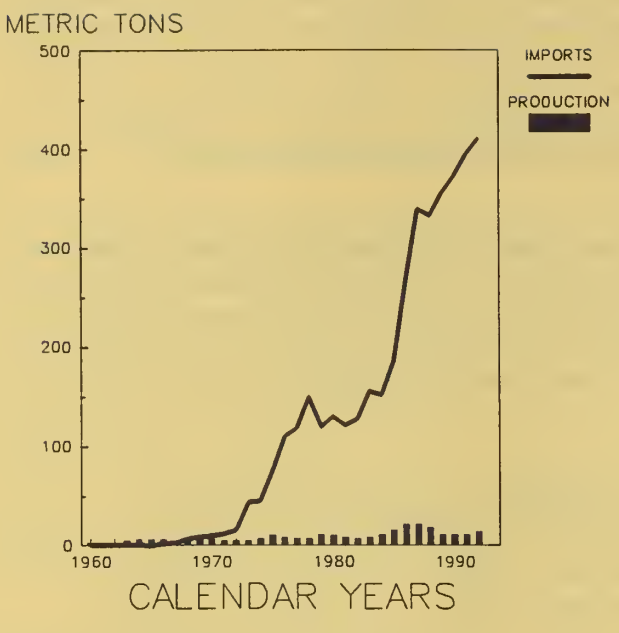
UNITED STATES -- PRODUCTION AND EXPORTS PROJECTED TO INCREASE IN 1992

U.S. hides and skins production increased marginally in 1991 compared to 1990 (about 1 percent), and is expected to increase about 3 percent in 1992 as slaughter rises with the upturn in the cattle cycle. U.S. hides exports, including whole and parts, calf and kip skins, and hog and pig skins declined in 1991 from the 1990 export levels because of reduced purchases by large quantity buying countries like Korea, Japan and the European Community. Only sheep and lambskin exports increased. Exports in 1992 are projected to increase, mostly from strength in Mexican and Korean markets.

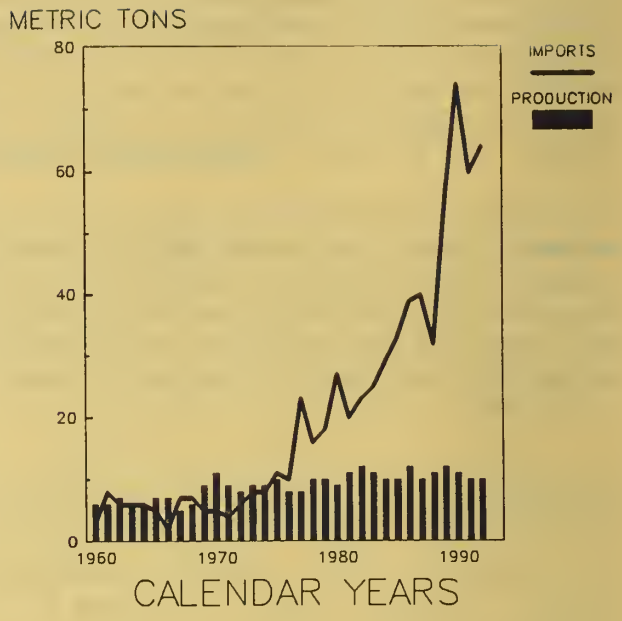
U.S. EXPORTS TO MAJOR MARKETS
WHOLE CATTLE HIDES
1,000 PIECES

	1987	1988	1989	1990	1991
Korea	10,142	9,961	10,313	9,839	9,285
Japan	5,929	7,011	6,206	6,755	4,661
Mexico	1,427	1,833	1,282	1,377	2,574
Taiwan	3,158	2,471	1,843	1,476	2,044
Others	3,297	3,087	3,590	1,877	1,453
Total	23,953	24,363	23,234	21,324	20,017

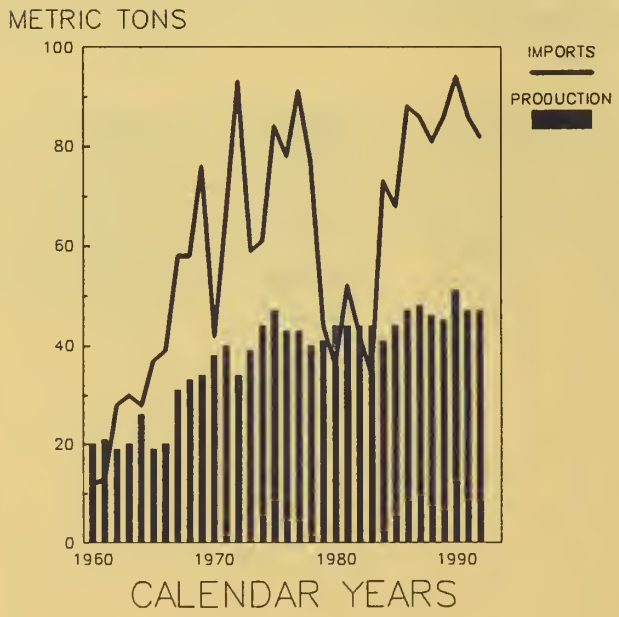
KOREA
HIDES AND SKINS
PRODUCTION AND IMPORTS



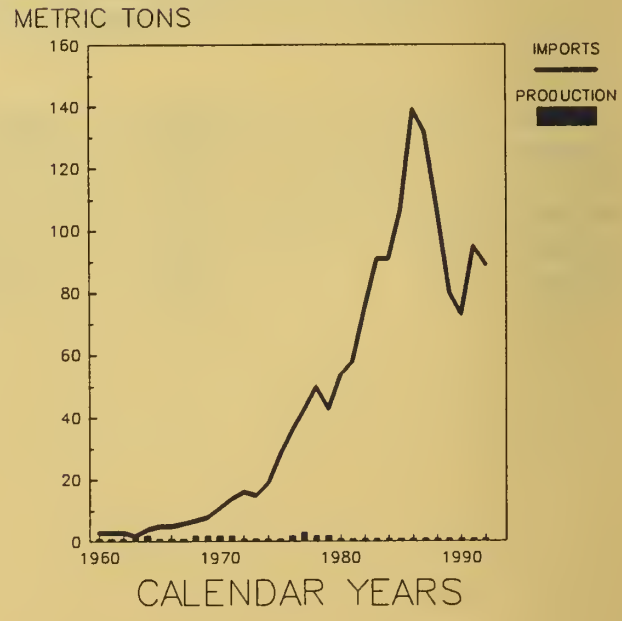
PORTUGAL
HIDES AND SKINS
PRODUCTION AND IMPORTS



SPAIN
HIDES AND SKINS
PRODUCTION AND IMPORTS



TAIWAN
HIDES AND SKINS
PRODUCTION AND IMPORTS



ARGENTINA -- EXPORT BAN CONTINUES WITH PRODUCTION BELOW POTENTIAL

The Argentine hide export ban remains the object of much speculation. Argentina continues to prohibit exports of raw hides, but long-standing rumors persist that the government may be willing to take action as part of its policy to deregulate and liberalize the domestic economy. About a year ago it was rumored that the government was considering allowing exports if production exceeded 13.5 million hides. With cattle slaughter running below 13 million head since 1986, and expected to reach about 12.2 million head in 1992, little chance is seen of reaching even the 13.5 million level this year. Argentina's capacity to produce hides has been estimated at about 16 million hides per year, but actual production has been running closer to 12 million hides.

VENEZUELA -- LOW STOCKS AND HIGH PRICES EXPECTED TO PUSH EXPORTS DOWN

Venezuela's hide exports jumped in 1990 but moderated in 1991. Exports increased from 3,000 tons in 1989 to 18,000 tons in 1990, of which about 87 percent were shipped to Italy. The increased 1990 exports were assisted by a 35 percent export bonus that lasted for most of the calendar year and by a devaluation that made prices internationally more competitive. In 1991, the Venezuelan hide industry pushed ahead with plans to expand exports, but the exported quantity declined from 18,000 tons to 12,000 tons in 1991 because the bonus was dropped from 35 to 10 percent, and a moderate rate of inflation eroded some of the benefits of devaluation. For 1992, exports are expected to decline further to about 10,000 tons as stocks continue to decline and domestic prices continue to increase.

SPAIN -- WEAK FOOTWEAR INDUSTRY TO HOLD 1992 PRODUCTION AND IMPORTS STEADY

Spain saw its hide production and imports increase in 1990, and then decline in 1991. While Spanish exports remained flat at about 16,000 tons in 1990, production rose 13 percent to about 51,000 tons, and imports increased from about 86,000 tons in 1989 to about 94,000 tons in 1990. Most of the 1990 increase in production and imports was reportedly used in the car and furniture industries.

In 1991, bovine hide production declined to a more normal 47,000 tons, but imports also declined to about 86,000 tons. Most of the import decline affected the Spanish footwear industry as imports of footwear in 1991 rose 59 percent and exports declined 9.5 percent. Slightly over half of Spain's hide imports come from other EC countries. For 1992, both production and imports are expected to remain stable near the 1991 quantities because of the footwear market.

PORTUGAL -- IMPORTS LIKELY TO REBOUND AS POLLUTION CONTROLS TAKE EFFECT

While Portugal is a relatively large importer and small producer of hides, averaging about 11,000 tons per year, its domestic industry is facing some tough challenges. Not only is Portugal's hide sector rather small and outdated, but its tanning sector is currently saddled with the application of EC pollution control regulations to become effective this year. Due to the competitiveness of the shoe market, some manufacturers have been utilizing high quality wet blue or even crusts instead of the traditional raw skins as a means of shortening the processing period. This trend is expected to be intensified this year once the pollution control regulations have been fully applied. While updating its infrastructure and pollution controls, however, some increase in imports may occur. Imports reached 74,000 tons in 1990, but declined to 60,000 tons in 1991. Imports are expected to rebound slightly in 1992 as the European Community's economy begins moving out of is recession.

HONG KONG -- MORE CHINESE CATTLE IMPORTS SET TO BOOST HONG KONG HIDE OUTPUT

Hong Kong's hide and leather industries continue to develop closer links with the Peoples Republic of China (PRC). Hong Kong's bovine hide processing is estimated at 155,800 pieces (2,680 metric tons) of which only 800 pieces were from locally raised cattle and the rest being produced from imported Chinese cattle. Hong Kong's 1992 bovine hide production is expected to increase because of larger imports of Chinese cattle.

Hong Kong's domestic utilization of bovine hides is primarily in shoe manufacturing, leather bags, and leather garments. Hides are imported as wet salted or wet blues and finished locally. Domestic consumption of hides continued to fall in 1991 to about 3,000 tons. About 30 percent of the locally manufactured leather goods are sold locally and 70 percent exported. The United States and Europe remain the largest export markets for Hong Kong-made leather goods.

Since the mid-1980's manufacturers have been taking advantage of lower labor costs in China. The number of leather garment/goods manufacturers in Hong Kong is now estimated to number less than twenty. The trend for manufacturers to move their operations to China to reduce costs is expected to continue because of cost reductions of 25-30 percent.

KOREA -- GOVERNMENT FUNDS SET TO MODERNIZE SHOE INDUSTRY

Preliminary estimates indicate that Korean leather shoe production in 1991 dropped 16 percent to about 210 million pair. In response to this perceived crisis in the shoe manufacturing industry, the Republic of Korea has recently announced a $267 million loan program to help shoe manufacturers purchase new equipment and modernize facilities. The funding will come in three allotments over three years (1992 through 1994) and only those firms with an exporting record will be eligible for assistance. The goals of the program are to reduce labor costs by 36 percent, reduce total manufacturing costs by 16 percent, and increase production by 6 percent. Roughly 50-60 percent of the funds will come via commercial banks at an interest rate of 12.5 percent. The remainder will be more heavily subsidized, and carry an eight year repayment period. With inflation in Korea officially running at about 10 percent per year, the assistance program is considered quite attractive.

Korean hide production held steady in 1991 compared to 1990 at 11,000 tons as farmers sent about the same number of cattle to slaughter each year and rebuilt inventories. Hide production in 1992 is expected to increase concurrent with a projected increase in cattle slaughter as increased demand for beef lifts cattle prices despite an increase in beef imports. Hide imports are projected to increase slightly in 1992 compared to 1991 as many countries recover from recession and purchases of leather goods increase.

TAIWAN -- FURTHER BOOSTS IN IMPORTS NOT EXPECTED IN 1992

Taiwan's hide industry, declining since 1987, showed some signs of recovery in 1991. Hide imports from January to October 1991 increased dramatically to 83,621 tons, surpassing the calendar year 1990 total of 72,657 tons. Taiwan's bovine hide imports are mainly used in the footwear industry.

TAIWAN
Imports of Bovine Hides

	1986	1987	1988	1989	1990	Jan-Oct.1991
Quantity (tons)	139,416	131,967	106,814	79,924	72,657	83,621

While some international finished product buyers have switched from Korea to Taiwan, China has also entered the equation. Tanners are importing raw hides to process into finished leather, with the finished leather being exported to the People's Republic of China. The substitution of cheaper pig skin was less in 1991 with the apparent decline in pig skin fashion. A much lower 1991 hide price also attributed to Taiwan's big hike in imports. With world hide production up in 1991, but accompanied by reduced world exports, Taiwanese buyers report that the average import CIF price in 1991 was down about 17 percent from 1990 prices. Taiwan's 1992 hide imports are expected to continue to decline as rising labor costs and increasing concern over tanners pollution continues to impair Taiwan's shoe manufacturing industry.

TAIWAN
COMPARATIVE RAW HIDE IMPORTS AND LEATHER EXPORTS

	Calendar Year 1990	Jan.-Oct. 1991
	(in metric tons)	
Bovine Hide Imports	72,657	83,621
Pig Skin Imports	66,247	49,286
Bovine Leather Exports	16,202	14,767

TALLOW AND GREASE

OVERVIEW

World tallow and grease production declined slightly in 1991, decreasing about about 0.2 percent compared to 1990. Production is expected to stay stable in 1992 at 6.72 million tons. World trade, which declined about 137,000 tons in 1990 over 1989, decreased another 70,000 tons in 1991, but is expected to stay flat in 1992. Trade data show declining exports in 1991 by the major exporting countries, particularly the United States. Scattered reports indicate that inedible tallow prices are still slightly higher than palm oil prices on a per ton basis. As a result, industrial uses for tallow (such as soap making) continue to edge lower while use in animal feeds continues to expand.

UNITED STATES -- PRODUCTION UP WHILE INEDIBLE TRADE HIT BY COMPETITION

U.S. tallow and grease production increased to almost 3.1 million tons in 1991, an increase of about 28,000 tons over 1990 production. Production in 1992 is expected to increase again as cattle slaughter increases with the upturn in the cattle cycle.

U.S. exports of inedible tallow declined to about 878,000 tons in 1991 from about 919,000 tons in 1990. Most of the loss occurred in 3 countries: the former USSR fell about 52,500 tons because of a need to direct its priorities to other commodities; Pakistan reduced imports by about 28,000 tons as palm products continued to make inroads; and Algeria reduced purchases by 31,000 tons. Other smaller purchasing countries (less than $2 million) reduced purchases by a combined 45,000 tons.

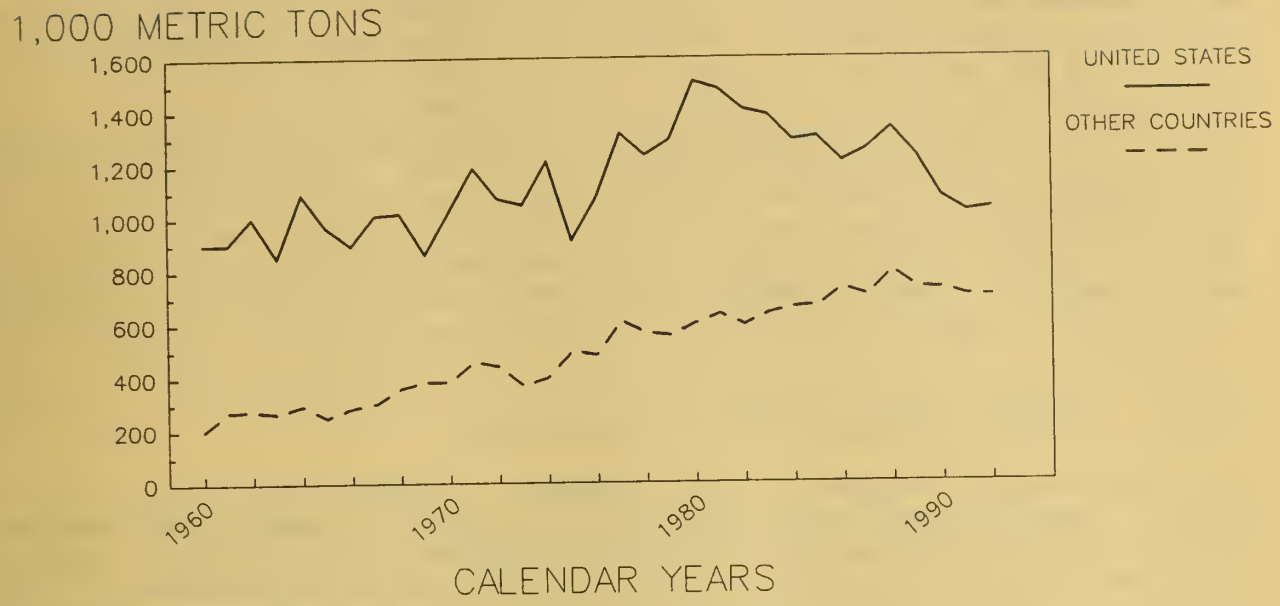
Exports of other animal fats and oil increased modestly in 1991 but not enough to offset the decline in inedible tallow. Edible tallow exports increased about 15,000 tons over 1990, choice white grease about 2,300 tons, lard about 15,000 tons and other various animal fats and oils about 60,000 tons. Edible tallow exports increased due to gives better quality and yields for the comparative price. Choice white grease, lard and other animal fats returned to more normal export levels compared to the reduced export volumes of 1990. Mexico continued as the largest edible tallow buyer, taking about 75 percent of the 129,000 tons exported. Columbia was the largest importer of choice white grease, taking one-third of total exports. Mexico remained the largest buyer of lard and other animal fats and oils.

UNITED STATES
AVERAGE CALENDAR YEAR PRICES
U.S. DOLLARS PER METRIC TON

	1987	1988	1989	1990	1991
Edible tallow	390	427	392	374	376
Inedible tallow	338	392	360	360	332
Choice white grease	303	484	254	361	311
Lard	476	500	470	460	432

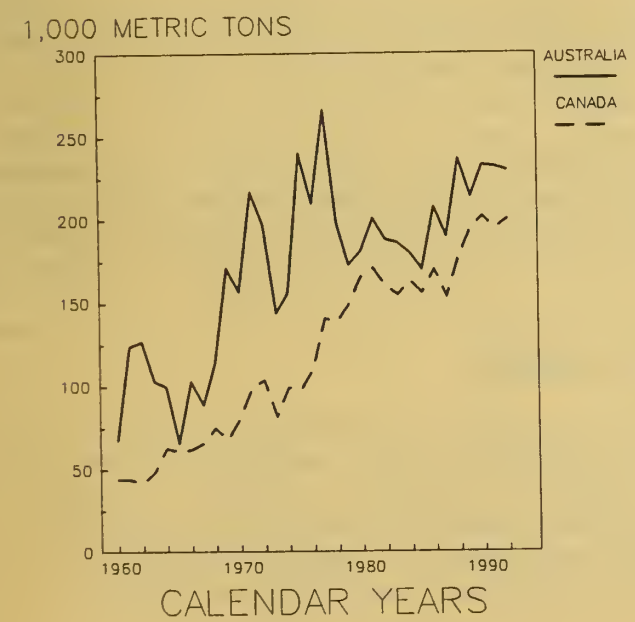
Source: U.S. Department of Commerce, Bureau of the Census.

TALLOW AND GREASE EXPORTS
UNITED STATES
OTHER MAJOR COUNTRIES

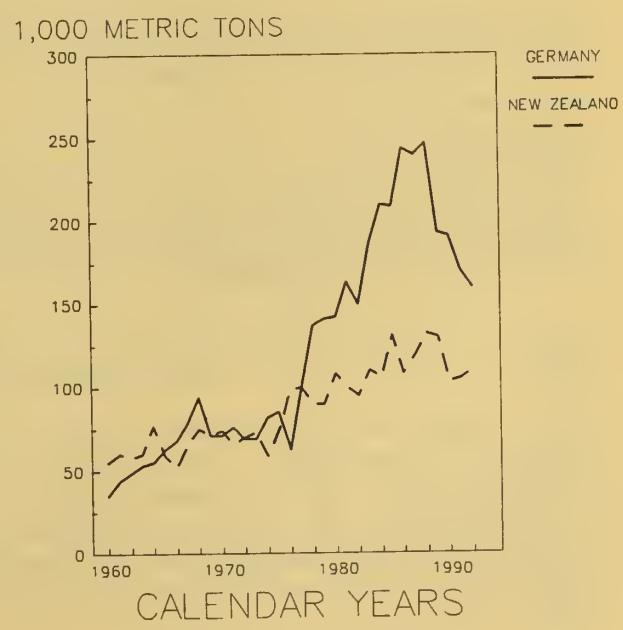


Other major countries:
Australia, Canada, Germany, New Zealand
(Countries exporting over 100,000 tons in 1991)

TALOW AND GREASE EXPORTS
AUSTRALIA AND CANADA



TALLOW AND GREASE EXPORTS
GERMANY AND NEW ZEALAND



ARGENTINA -- REDUCED SUPPLIES MAY FORCE FURTHER IMPORTS

Argentina has been a tallow exporter every year since 1960, and has imported tallow only twice since that time. Nevertheless, Argentina's tallow exports have been trending downward since 1981 when exports peaked at 85,000 tons.

Argentina was an exporter of tallow in the first half of 1991, and an importer in the second half of the year. In the first six months of 1991 Argentina's cattle kill was sufficient to supply its tallow needs, and allow exports of about 13,000 tons, mostly to Brazil. In the second half of the year, however, slaughter dropped at the same time that the economy improved. With tallow in shorter supply, Argentina imported almost 8,500 tons from the United States at a price of about $360 per ton. This imported price compares to the Argentine domestic price of about $310 per ton in the latter part of 1991. Imports of about 15,000 tons are forecast for 1992 as a result of reduced cattle slaughter, reduced domestic tallow production and slightly increased utilization. Argentine production for 1992 is forecast at 270,000 tons.

BRAZIL -- IMPORTS OF 60,000 TONS LIKELY FOR 1992

Continued economic recession and weak consumer purchasing power restrained Brazil's domestic tallow sector expansion in 1991. As a result, 1991 imports increased to about 60,000 tons. Argentina supplied about 13,000 tons because of the Mercosur Agreement which concedes tariff preferences to member countries. If the recession continues through 1992 and production remains stagnant, imports will likely remain at about 60,000 tons. With Argentina experiencing tight supplies and Brazil restricted to marginal production increases, alternative (non-Argentine) imports sources will see increased business.

SPAIN -- RISING FEED DEMAND MAKES INCREASED IMPORTS LIKELY

In 1991, according to Spanish data, Spain imported about 190,000 tons of tallow and grease, of which 130,000 tons came from EC countries and 60,000 tons from the United States. Of the 60,000 tons imported from the U.S., about 40,000 tons were classified as tallow. U.S. exports were 11,000 tons higher than in the previous year. The increase in imports from the U.S. is due to increased use of tallow and yellow grease in animal feed. With Spain's tallow production remaining practically level in 1992, and feed utilization expected to increase slightly, exports to Spain are expected to increase slightly to about 65,000 tons from non-EC sources.

EGYPT -- PALM STEARIN BASHES MAJOR TALLOW MARKET

Egypt does not produce tallow in sufficient quantity or quality for industrial purposes. The public sector imports all inedible tallow, mainly from the United States, for soap manufacture. Tallow utilization increased to about 27,000 tons in 1991, despite competition with lower priced palm stearin from Malaysia and the removal of the consumer soap subsidy. Nevertheless, this quantity is very small compared to the 273,000 tons that Egypt utilized in 1984.

The public sector Food Industries Holding Company (FIHC) is the main importer of tallow. In 1991, FIHC tendered for about 129,500 metric tons of inedible tallow or palm stearin. Out of this amount, only 27,000 tons of tallow were imported, all from the United States, leaving the balance for palm stearin. In 1991, palm stearin was offered at $283.90 per metric ton C&F Alexandria, compared to $354.75 per metric ton for tallow. Extremely low prices of palm stearin likely will encourage FIHC to continue to substitute palm stearin for tallow in the manufacture of public sector soap.

HONG KONG -- TALLOW AND GREASE MARKET REMAINS SMALL BUT IMPORTANT

Hong Kong has never been a large buyer or user of tallow, but its domestic industry has been shrinking even further in the past few years, and production has fallen to almost negligible amounts. Although Hong Kong does have a substantial noodle-making industry, most food processing firms use vegetable oil for frying. Local bakeries, many of which are managed by European chefs, tend to prefer butter. Most tallow is used, therefore, for feed or industrial purposes. Imports and exports of tallow are usually small and fluctuate from year to year. Both imports and exports in 1991 dropped substantially.

In 1991, Hong Kong purchased no choice white grease from the United States after purchasing 39 tons in 1990. Hong Kong returned to the market and purchased 134 tons in 1991. In addition, Hong Kong increased its purchases of lard (78 tons) and other animal fats (904 tons) in 1991. For 1992, even if choice white grease purchases are reduced, Hong Kong's is projected to maintain its lard and other animal fats and oil purchases as part of its inventory maintenance.

KOREA -- INCREASED FEED DEMAND LIKELY TO BOOST TALLOW IMPORTS

In contrast to Hong Kong, Korea has been an increasingly important import market for tallow since 1960. In 1984, imports reached their peak at about 174,000 tons. Since 1984, imports have declined and now appear to be holding in the 100,000 to 120,000 tons per year range. Much of the import decline since 1984 can be attributed to Korea's own developing domestic tallow industry, which, starting at zero in 1985, reached 100,000 tons in 1991.

Korea's livestock numbers and feed use per animal are expected to increase this year. Tallow and yellow grease use is expected to increase again in 1992 in parallel with a projected increase in compound feed manufacturing. Tallow utilization is expected to rise in 1992 to about 220,000 tons based on increased use in the feed industry. Use of tallow by soap manufacturers has remained stable for several years and is expected to do so again in 1992.

KOREA
TALLOW UTILIZATION
1985 - 1991
(1,000 metric ton)

SECTOR	1985	1986	1987	1988	1989	1990	1991(p)	1992(f)
Food use	41	33	22	18	16	6	10	10
Soap use	70	45	68	61	67	65	65	70
Feed use	25	50	76	84	93	109	125	140
Total	136	128	166	163	176	180	200	220

(p) estimated (f) forecast
Source: Estimates from U.S. Agricultural Counselor, Seoul.

The recently constructed storage facilities for tallow still remain almost empty. These tanks, recently opened at the port of Pusan have a combined storage capacity of about 31,000 tons. Current holdings are less than 2,000 tons of Australian tallow.

TAIWAN -- HOG GROWTH TO PUSH FURTHER TALLOW IMPORTS

Because there is no local production of tallow, Taiwan's demand must be met by imports. The feed industry is Taiwan's number one consumer of tallow and usually takes about half of all imports. Production of hogs, Taiwan's major livestock sector, grew 10 percent in 1991. Growth in tallow imports almost mirrored this increase growing 8 percent to 77,000 tons. Imports are forecast to grow more moderately in 1992 to 80,000 tons with further strong demand from the livestock sector. The U.S. share of tallow imports declined from 16 percent in 1990 to only 4 percent in 1991 due mainly to uncompetitive prices.

TAIWAN
COMPARATIVE MARKET SHARE
TALLOW IMPORTS

	Australia		New Zealand		United States	
	CY 1990	Jan-Sept 1991	CY 1990	Jan-Sept 1991	CY 1990	Jan-Sept 1991
Market share (percent)	64	64	18	32	16	4
Unit price ($US/MT FOB)	246	238	213	198	226	257

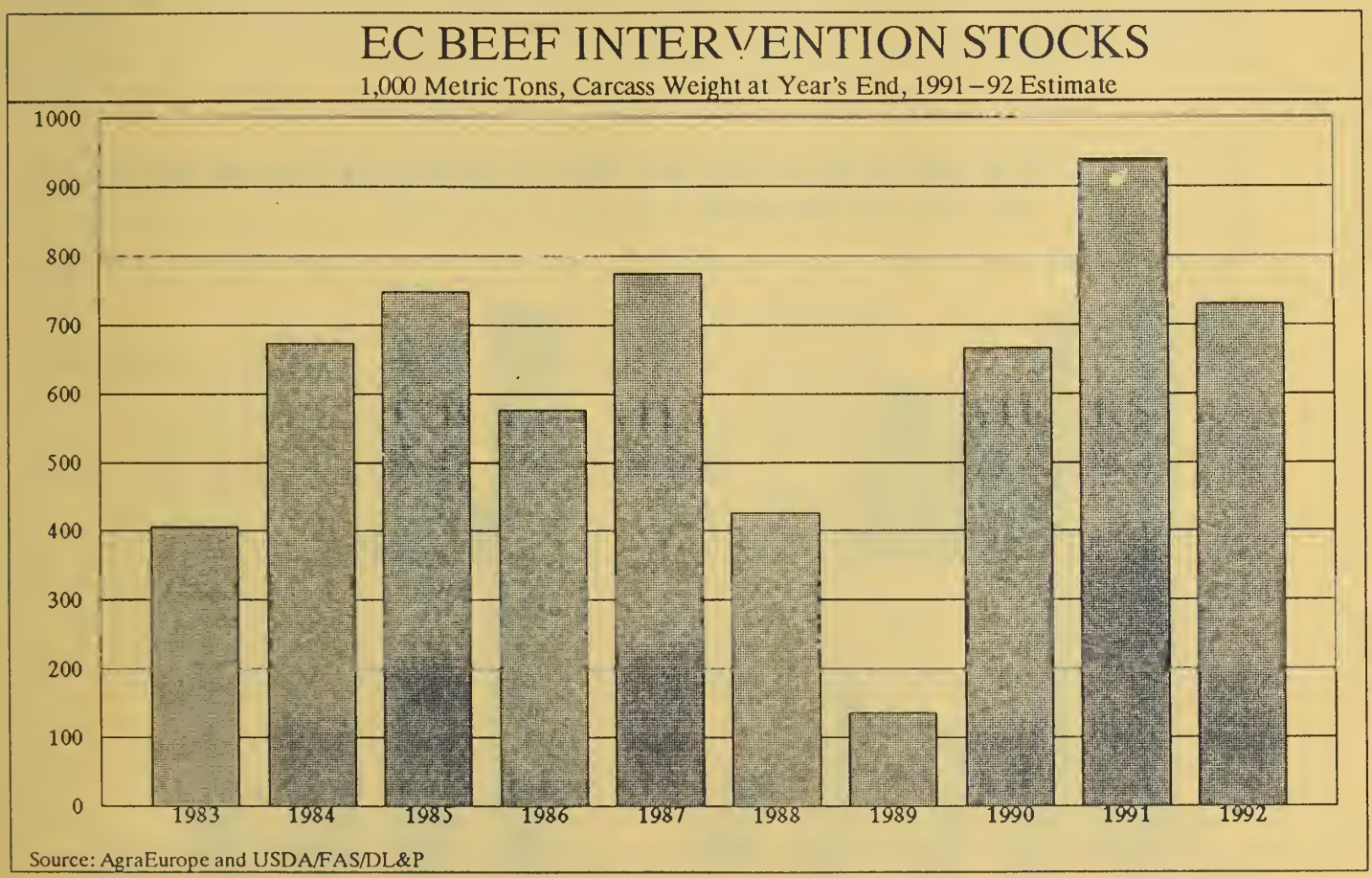
Source: Taiwan Customs Data.

EC BEEF INTERVENTION STOCKS APPROACH ONE MILLION TONS

Beef intervention stocks in the European Community are estimated to have reached a record-level 940,000 metric tons in 1991, surpassing the previous record of 775,000 tons set in 1987. A combination of factors led to the build-up in stocks, including a sharp rise in production and the continued disruption of traditional export markets.

The sharper than expected rise in production was the result of the combined effects of German unification and further cuts in milk quotas. Beef production reached 8.63 million tons in 1991, or a 4.0 percent increase over last year's total of 8.3 million tons. The embargo on Iraq and concerns over BSE continued to hurt EC exports to their traditional markets in the Middle East. Exports to the region remained sluggish in 1991 after dropping to 76,000 tons in 1990 from 154,000 tons in 1989.

Despite reaching record levels in 1991, year-end stocks would have been much higher had it not been for a significant increase in exports to non-traditional markets. Particularly notable were the reportedly large-scale exports to Brazil and the republics of the former Soviet Union. This is similar to the situation in 1989 when the EC reduced stocks by exporting large amounts to Brazil, Eastern Europe and the Soviet Union.



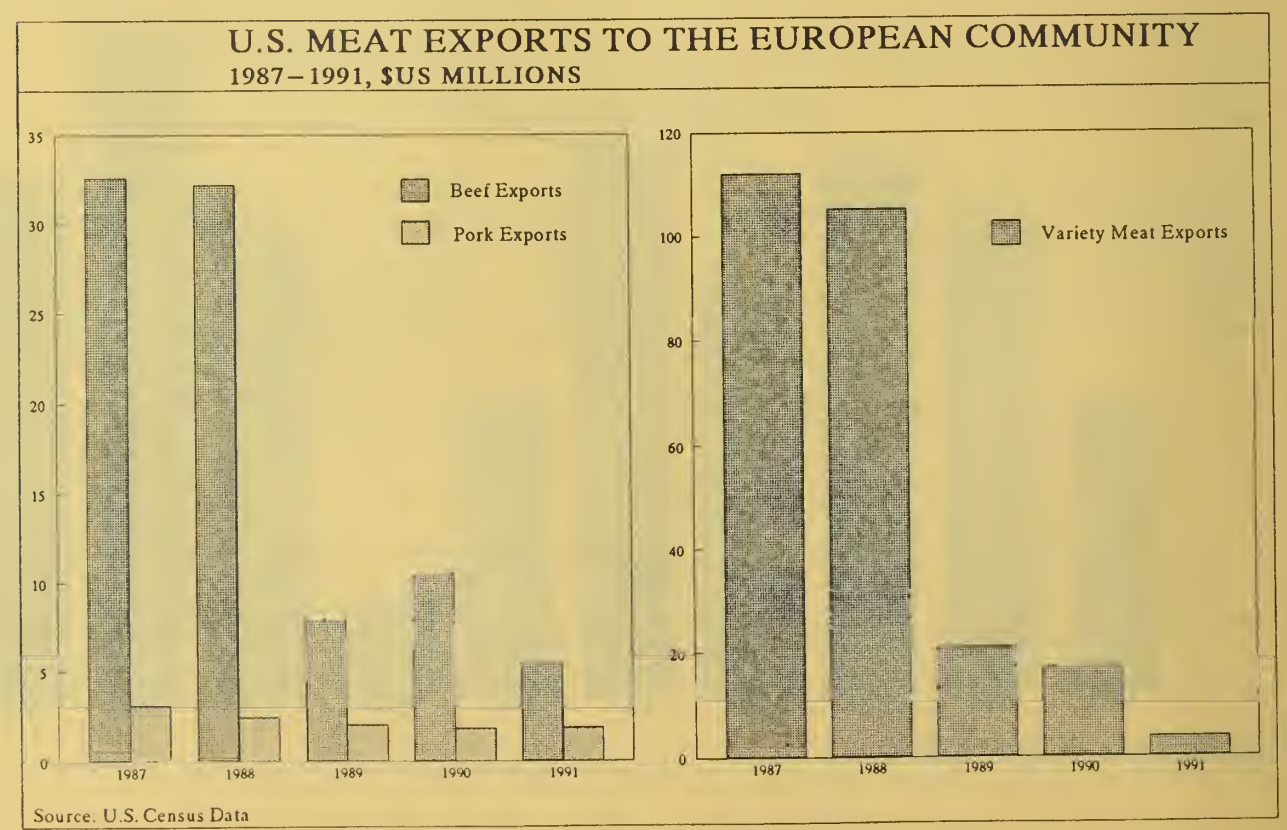
THIRD COUNTRY MEAT DIRECTIVE UPDATE

Discussions continue between the United States and the European Community (EC) over the issue of the Third Country Meat Directive (TCMD). These discussions are the second phase of a two-phased process agreed to in an exchange of letters with the EC in May, 1991. Phase I concluded last fall when the EC relisted a total of 14 U.S. meat plants.

Phase II began in December and discussions continue at this time. This phase involves agreeing to a framework over the issue of equivalent vs. identical inspection requirements. The U.S. position is that a final resolution is dependent on the EC recognizing the equivalence of the U.S. inspection system, instead of requiring U.S. plants to operate identically to the EC plants.

The TCMD is a regulation by which the EC controls meat imports based on sanitary regulations. The Directive requires individual inspection and certification by EC veterinarians of U.S. meat plants wishing to export to the EC, or those reinitiating exports after a lapse. The Directive was fully implemented vis-a-vis the United States in April 1988.

In addition to the Directive, the EC also implemented its import ban for meat treated with growth hormones on January 1, 1989. These two actions have combined to dramatically reduce U.S. meat exports to the EC over the past three years. In 1988 beef, pork, and variety meat exports totaled $139.8 million. This total collapsed to $31.0 million in 1989, $29.5 million in 1990, and $12.2 million in 1991.



NEW OPPORTUNITIES EXIST FOR PORK EXPORTS TO JAPAN

The recent suspension of Taiwanese pork exports through the Japanese port of Nagoya may result in expanded export opportunities for other exporters, including the United States. The suspension came about late last year due to a tax evasion case uncovered by the Japanese police. Five importers (who collectively account for nearly 100 percent of Taiwan's shipments through Nagoya) were exposed by the police for taking advantage of the variable levy system in order to evade import taxes by declaring a higher CIF price than actually paid.

The immediate impact of the suspension was to increase prices for the lower cuts, especially for shoulders and bellies used in processing picnic hams, sausages, and bacon. It has also resulted in Japanese manufacturers raising their specifications and negotiating new contracts with Taiwanese exporters for selected pork cuts rather than the traditional full sets. Japanese traders also turned to other suppliers of lower-priced cuts, namely Denmark and the United States. While Denmark and Taiwan will continue to dominate the bellies' market, expanded opportunities do exist for the United States to export shoulders and hams.

These developments come at a good time for U.S. exporters. U.S. exports are dominated by the higher price cuts such as loins and tenderloins. However, prices for loins in Japan are weak due to high stocks and reduced consumer demand. Meanwhile, prices for shoulders, bellies, and hams are up due to the Nagoya situation and increased demand. Importers expect this situation to continue as the shift in consumer demand from loins to the inexpensive cuts is seen as long term.

U.S. AND TAIWANESE PORK EXPORTS TO JAPAN

Share of Country's Total Exports by Cut

Source: DL&P/FAS/USDA

CANADA & MEXICO - A LOOK AT NORTH AMERICAN LIVESTOCK & PRODUCT TRADE

Negotiations on the North American Free Trade Agreement (NAFTA) continue with the eventual goal being the crafting of a trade agreement which phases out all barriers to trade between the United States, Canada and Mexico. Details about the timing of the eventual elimination have yet to be worked out and will vary by commodity. In general it is anticipated that U.S. livestock and product trade will benefit from the elimination of barriers. A free trade agreement would be expected to decrease the cost for Mexico of imported feed ingredients. Likewise, the price of imported livestock and products would also decline. Lower tariffs on imported meat would stimulate imports but would also increase competition in the Mexican industry and in the long run cause it to become more efficient and prosperous. As incomes rise in Mexico, greater export opportunities would also become available for U.S. livestock and products.

Since Mexico joined the GATT in 1986, they have continued unilateral policies of tearing down trade barriers. U.S. exports of livestock and products have more than tripled from $226 million in 1986 to $874 million in 1991. During the same period our imports of livestock and livestock products has increased from $311 million to $389 million in 1991. Since the start of the United States-Canada Free-Trade Agreement (CFTA) in 1989, U.S. exports of livestock and products has increased, although the U.S. still has a sizable deficit in these products with Canada. Exports of U.S. livestock and products totaled $296 million in 1988 and $679 million in 1991. Imports of livestock and products from Canada totaled $1,054 million in 1988 and $1,429 million in 1991. More specifics of U.S. livestock and products trade with Canada and Mexico follow.

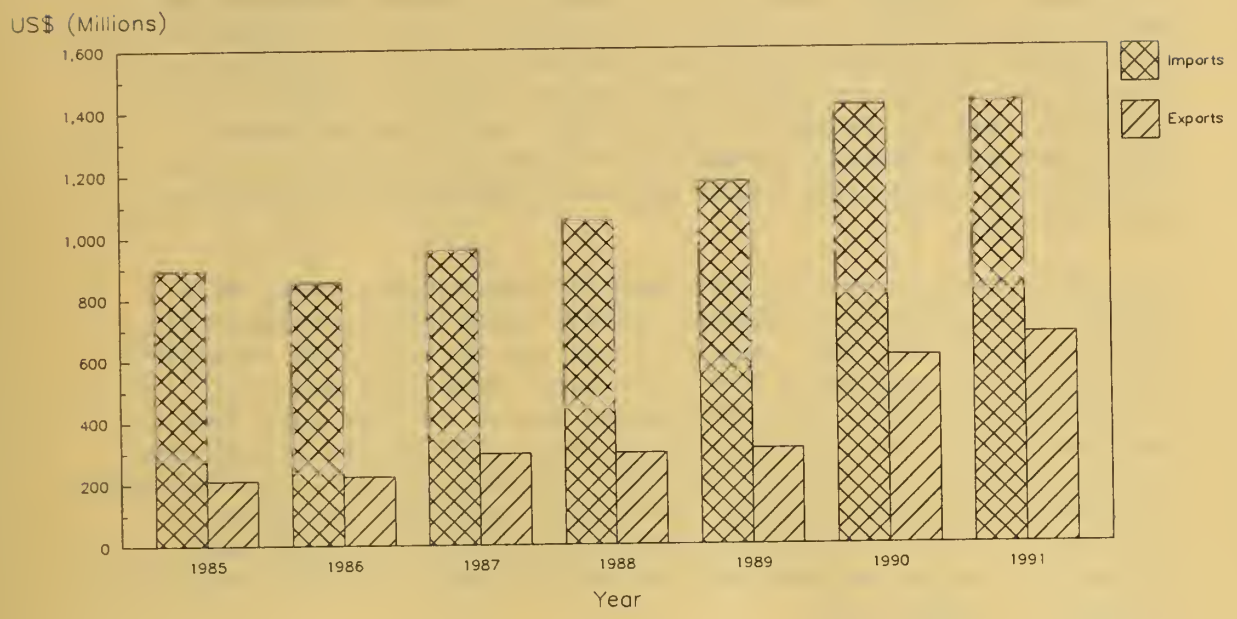
U.S. Exports of Livestock & Products

Exports to Canada Commodity	1989	1990	1991	Exports to Mexico Commodity	1989	1990	1991
	(in $ million)				(in $ million)		
Beef & veal	126	306	385	Beef & veal	78	81	185
Pork	12	26	28	Pork	56	37	68
Variety meats	15	23	29	Variety meats	67	79	98
Tallow & others oils	10	13	16	Tallow & other oils	90	80	93
Hides & skins	42	59	33	Hides & skins	99	97	137
Furskins	45	67	27	Furskins	--	--	--
Cattle	11	15	36	Cattle	72	55	133
Others	60	117	140	Others	99	103	160
TOTAL	310	608	679	Total	561	532	874

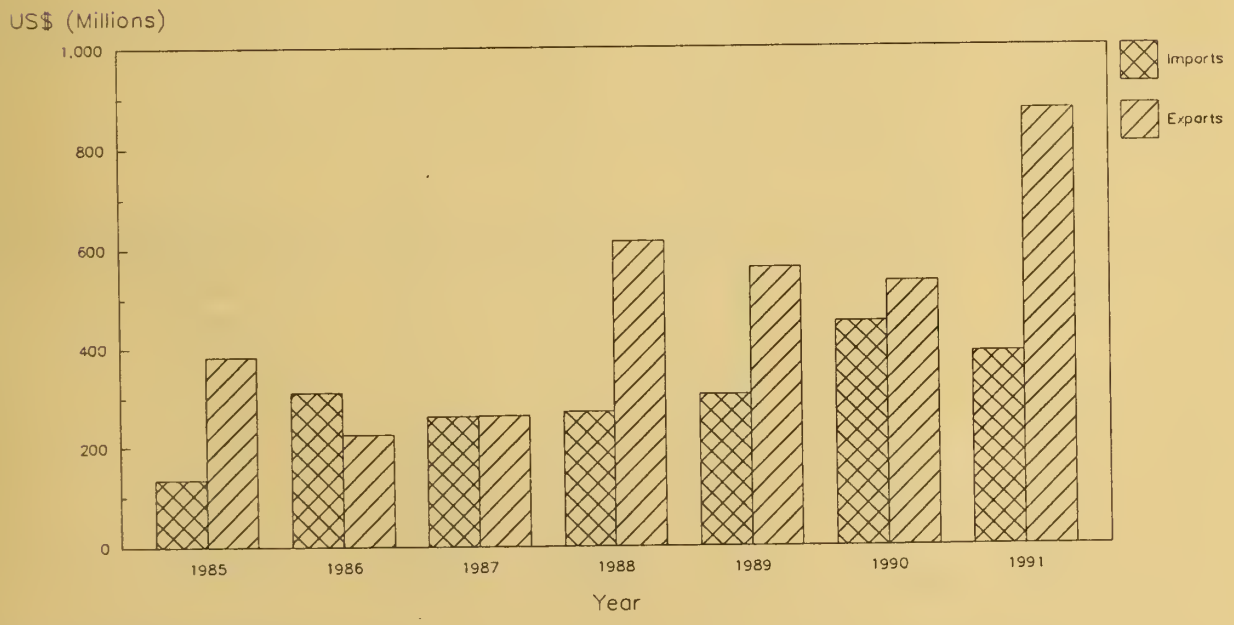
U.S. Imports of Livestock & Products

Imports from Canada Commodity	1989	1990	1991	Imports from Mexico Commodity	1989	1990	1991
	(in $ million)				(in $ million)		
Beef & veal	189	191	192	Beef & veal	--	3	2
Pork	358	433	381	Pork	--	--	--
Hides & skins	43	37	63	Hides & skins	6	12	4
Furskins	37	39	29	Furskins	--	--	--
Cattle	377	559	590	Cattle	284	419	361
Swine	101	94	108	Swine	--	--	--
Other	67	63	66	Other	21	17	22
TOTAL	1172	1416	1429	TOTAL	305	451	389

US Livestock and Products Trade: Canada



US Livestock and Products Trade: Mexico



Note: Live Animals, Beef, Veal, Pork, Lamb, Mutton, Goat, Other Meat Products, Hides and Skins, Semen, Other Animal By-Products.

CANADA'S NATIONAL TRIPARTITE STABILIZATION PROGRAM

The National Tripartite Stabilization Program (NTSP) was founded in 1986 as a price support mechanism for cattle, hogs and lambs, as well as sugar beets, apples, onions, dry beans, and honey. Under this program, the federal and provincial governments and producers contribute equally to a fund that makes payments when market prices fall below calculated support prices. Payments for the cattle plan are computed on a monthly basis, except for an annual cow-calf plan, while hog and lamb payouts are made on a quarterly basis. Payments are for all cattle in the program. There has never been a payout for the cow-calf sector. Cattle exported to the United States are not singled out nor excluded from payouts.

According to the Canadian Cattlemen's Association, total NTSP payments in 1991 for slaughter cattle, minus producer premiums, equaled $C11.6 million, nearly .3 percent of farm cash receipts for cattle and calves of $C3.8 billion. NTSP payments for slaughter cattle were the highest on record for the last four months of 1991, reflecting a sharp decline in market prices and rising feed costs. During the final quarter of 1991, payouts were also made for feeder cattle, the first time since the first quarter of 1990. The average NTSP payment for slaughter and feeder cattle during the last quarter of 1991 were $C153 and $C39 per head, respectively.

Payouts for slaughter hogs under NTSP were made during the last half of 1991 and were the highest since 1989. The 1991 fourth quarter payout for hogs was $C19 per head. The payment for lambs over the same period was also $C19 per head.

HISTORY OF NATIONAL TRIPARTITE STABILIZATION PROGRAM PAYMENTS

(Canadian Dollars Per Head)

		Slaughter Cattle	Feeder Cattle	Cow/ Calf	Hogs*	Lambs*
1986	1st Qtr	0	0	0	0	0
	2nd Qtr	13.20	0	0	0	0
	3rd Qtr	0	0	0	0	0
	4th Qtr	0	0	0	0	0
1987	1st Qtr	0	0	0	0	0
	2nd Qtr	0	0	0	0	0
	3rd Qtr	0	0	0	0	0
	4th Qtr	17.37	0	0	0	0
1988	1st Qtr	37.91	0	0	3.14	0
	2nd Qtr	42.45	0	0	0	0
	3rd Qtr	100.95	32.79	0	23.53	0
	4th Qtr	87.92	38.56	0	37.08	6.83
1989	Jan	17.09	0	0	Q	Q
	Feb	3.02	0	0	Q	Q
	Mar	0	3.96	0	38.24	12.58
	Apl	44.50	16.62	0	Q	Q
	May	59.83	23.68	0	Q	Q
	Jun	68.58	9.32	0	36.27	9.02
	Jul	49.30	0	0	Q	Q
	Aug	10.28	0	0	Q	Q
	Sep	17.35	1.65	0	33.14	7.50
	Oct	12.93	0	0	Q	Q
	Nov	29.21	0	0	Q	Q
	Dec	5.16	0	0	16.37	9.34
1990	Jan	0	0	0	Q	Q
	Feb	0	0	0	Q	Q
	Mar	11.96	11.45	0	9.67	17.79
	Apl	0	0	0	Q	Q
	May	10.23	0	0	Q	Q
	Jun	0	0	0	0	12.86
	Jul	0	0	0	Q	Q
	Aug	0	0	0	Q	Q
	Sep	0	0	0	0	15.53
	Oct	0	0	0	Q	Q
	Nov	0	0	0	Q	Q
	Dec	0	0	0	1.12	17.87
1991	Jan	0	0	0	Q	Q
	Feb	0	0	0	Q	Q
	Mar	0	0	0	0	20.44
	Apl	0	0	0	Q	Q
	May	0	0	0	Q	Q
	Jun	0	0	0	0	23.37
	Jul	33.68	0	0	Q	Q
	Aug	98.09	0	0	Q	Q
	Sep	131.06	0	0	16.55	12.33
	Oct	137.53	11.44	0	Q	Q
	Nov	189.67	51.59	0	Q	Q
	Dec	132.86	55.34	0	18.98	18.78

* Q - payments only announced quarterly for hogs or lambs.

BEEF AND VEAL SUMMARY
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
PRODUCTION						
United States	10,884	10,880	10,633	10,464	10,530	10,760
Canada	977	973	980	924	879	895
Mexico	1,205	1,754	2,140	1,790	1,580	1,600
Argentina	2,700	2,610	2,600	2,650	2,640	2,560
Brazil	4,000	4,100	3,800	3,600	3,700	3,840
Colombia	654	707	741	795	823	839
European Community (EC-12)	8,472	8,014	7,851	8,302	8,627	8,250
Czechoslovakia	458	451	488	454	391	390
Poland	835	783	729	838	726	654
Former USSR	8,288	8,600	8,800	8,814	8,160	7,700
South Africa, Rep. of	583	553	582	661	678	691
India	2,020	1,782	1,847	1,868	1,901	1,883
China (Mainland)	792	958	1,072	1,250	1,370	1,500
Japan	565	570	548	549	573	590
Australia	1,549	1,533	1,565	1,718	1,675	1,699
New Zealand	563	562	550	471	532	548
Other Countries	3,375	3,371	3,439	3,739	3,551	3,501
T O T A L	47,920	48,201	48,365	48,887	48,336	47,900
IMPORTS						
United States	1,040	1,092	988	1,069	1,091	1,048
Canada	135	153	158	185	210	210
Mexico	4	15	40	60	100	140
Brazil	167	26	218	250	150	70
European Community (EC-12)						
Including EC-Intra Trade	1,824	1,894	1,927	1,894	2,078	1,997
Excluding EC-Intra Trade	410	467	449	401	405	410
Poland	0	44	90	3	30	50
Yugoslavia	41	53	60	72	20	18
Former USSR	142	117	150	250	400	430
Israel	41	44	38	31	42	36
Egypt	170	150	181	120	115	135
South Africa, Rep. of	48	68	58	33	23	25
Taiwan	39	46	46	46	53	54
Hong Kong	79	90	80	81	83	84
Japan	315	380	498	537	515	580
Korea, Rep. of	0	20	83	117	172	210
Other Countries	199	144	123	184	129	159
T O T A L	4,244	4,336	4,738	4,932	5,211	5,246
Excluding EC-Intra Trade	2,830	2,909	3,260	3,432	3,531	3,653
EXPORTS						
United States	277	313	464	456	539	612
Canada	93	86	108	110	106	110
Argentina	287	320	360	451	372	280
Brazil	302	550	323	230	300	380
Uruguay	93	132	177	192	110	110
European Community (EC-12)						
Including EC-Intra Trade	2,324	2,313	2,658	2,553	2,957	2,721
Excluding EC-Intra Trade	910	886	1,180	1,060	1,284	1,133
Austria	63	58	49	56	64	55
Romania	115	120	100	0	5	0
India	134	132	126	126	140	132
China (Mainland)	34	54	57	155	219	250
Australia	908	890	872	1,064	1,031	1,032
New Zealand	432	435	435	359	435	448
Other Countries	299	272	286	288	252	251
T O T A L	5,361	5,675	6,015	6,040	6,530	6,381
Excluding EC-Intra Trade	3,947	4,248	4,537	4,547	4,857	4,793
CONSUMPTION						
United States	11,660	11,643	11,196	11,048	11,072	11,240
Canada	1,021	1,033	1,032	1,001	986	995
Mexico	1,209	1,769	2,176	1,845	1,672	1,730
Argentina	2,413	2,304	2,250	2,220	2,290	2,280
Brazil	3,835	3,601	3,690	3,600	3,500	3,580
Colombia	640	700	734	782	807	824
European Community (EC-12)	7,877	7,638	7,546	7,289	7,597	7,655
Poland	805	810	782	779	756	689
Former USSR	8,423	8,710	8,945	9,059	8,560	8,130
Egypt	554	531	567	528	535	545
South Africa, Rep. of	638	614	638	690	700	720
India	1,886	1,650	1,721	1,742	1,761	1,751
China (Mainland)	758	904	1,015	1,095	1,151	1,250
Japan	880	900	986	1,075	1,133	1,190
Australia	639	662	700	651	637	673
Other Countries	3,414	3,469	3,553	3,945	3,767	3,803
T O T A L	46,652	46,938	47,531	47,349	46,924	47,055

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

PORK SUMMARY
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
PRODUCTION						
United States	6,519	7,114	7,173	6,964	7,258	7,758
Canada	1,131	1,188	1,184	1,134	1,134	1,140
Mexico	950	964	910	792	820	825
Brazil	1,200	1,100	950	1,050	1,100	1,150
European Community (EC-12)	13,596	14,134	13,979	14,084	13,703	13,714
Czechoslovakia	843	938	960	942	894	894
Hungary	1,064	986	1,079	970	893	725
Poland	1,745	1,845	1,870	1,870	2,085	2,185
Romania	900	840	600	620	600	590
Yugoslavia	871	819	791	799	720	740
Former USSR	6,324	6,600	6,700	6,646	6,150	5,550
China (Mainland)	18,349	20,176	21,228	22,811	23,009	23,100
Taiwan	938	911	917	1,009	1,115	1,200
Japan	1,581	1,578	1,594	1,555	1,490	1,450
Other Countries	3,226	3,391	3,561	3,517	3,477	3,604
T O T A L	59,237	62,584	63,496	64,763	64,448	64,625
IMPORTS						
United States	542	515	406	407	352	354
Canada	22	15	12	12	13	15
Mexico	0	16	27	17	40	60
Brazil	0	0	60	2	2	1
European Community (EC-12)						
Including EC-Intra Trade	2,168	2,289	2,380	2,396	2,509	2,588
Excluding EC-Intra Trade	113	131	110	109	132	115
Sweden	13	16	15	16	19	20
Poland	14	6	20	36	60	10
Romania	0	0	0	70	10	15
Yugoslavia	14	42	43	84	20	15
Former USSR	318	218	220	280	320	350
Hong Kong	202	223	217	230	203	208
Japan	401	461	491	488	565	615
Singapore	21	17	32	27	25	26
Other Countries	14	13	14	17	32	13
T O T A L	3,729	3,831	3,937	4,082	4,170	4,290
Excluding EC-Intra Trade	1,674	1,673	1,667	1,795	1,793	1,817
EXPORTS						
United States	49	88	119	108	118	127
Canada	301	319	305	314	275	300
Brazil	10	17	14	13	17	20
European Community (EC-12)						
Including EC-Intra Trade	2,762	2,935	2,785	3,010	3,112	3,092
Excluding EC-Intra Trade	706	776	513	710	735	634
Finland	17	9	14	23	19	15
Sweden	36	40	46	39	18	7
Czechoslovakia	25	35	40	40	40	40
Hungary	123	133	135	210	200	180
Poland	75	76	73	50	30	50
Romania	150	140	180	0	26	50
Yugoslavia	27	24	20	23	15	30
China (Mainland)	200	170	203	235	278	300
Taiwan	194	178	160	225	300	330
Korea, Rep. of	4	10	15	7	4	15
Other Countries	22	28	44	27	21	18
T O T A L	3,995	4,202	4,153	4,324	4,473	4,574
Excluding EC-Intra Trade	1,939	2,043	1,881	2,004	2,076	2,096
CONSUMPTION						
United States	6,964	7,506	7,516	7,271	7,448	7,993
Canada	852	879	892	835	870	856
Mexico	950	980	937	809	859	883
Brazil	1,180	1,098	996	1,035	1,090	1,130
European Community (EC-12)	13,036	13,497	13,608	13,430	13,109	13,237
Czechoslovakia	823	908	925	907	834	854
Hungary	938	851	937	734	706	555
Poland	1,724	1,776	1,805	1,881	2,105	2,137
Romania	750	710	410	685	589	565
Yugoslavia	835	862	795	845	800	757
Former USSR	6,636	6,813	6,915	6,921	6,470	5,900
China (Mainland)	18,149	20,006	21,025	22,576	22,731	22,800
Taiwan	744	733	757	784	815	870
Japan	1,982	2,040	2,057	2,069	2,073	2,080
Korea, Rep. of	466	531	590	547	548	595
Philippines	496	540	610	670	690	710
Other Countries	2,440	2,498	2,499	2,503	2,463	2,499
T O T A L	58,965	62,228	63,274	64,502	64,200	64,421

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

LAMB, MUTTON, AND GOAT MEAT SUMMARY
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
PRODUCTION						
United States	143	152	157	165	165	165
Argentina	82	87	96	88	85	87
European Community (EC-12)	1,014	1,052	1,124	1,200	1,223	1,212
Bulgaria	98	89	78	77	70	70
Former USSR	905	960	1,000	1,008	965	900
Turkey	382	380	375	370	365	360
South Africa, Rep. of	201	194	202	238	236	236
India	550	544	560	570	579	585
China (Mainland)	719	802	962	1,090	1,134	1,200
Australia	591	549	585	646	625	638
New Zealand	583	576	574	500	529	526
Other Countries	325	321	331	356	350	333
T O T A L	5,593	5,706	6,044	6,308	6,326	6,312
IMPORTS						
United States	20	23	29	27	27	27
Mexico	2	3	8	10	12	15
European Community (EC-12)						
Including EC-Intra Trade	321	337	363	380	358	404
Excluding EC-Intra Trade	206	210	212	229	204	232
Former USSR	35	18	15	15	20	30
Japan	153	155	139	128	130	120
Korea, Rep. of	16	25	26	23	17	20
Other Countries	9	7	7	8	4	3
T O T A L	556	568	587	591	568	619
Excluding EC-Intra Trade	441	441	436	440	414	447
EXPORTS						
Argentina	7	8	7	10	12	12
European Community (EC-12)						
Including EC-Intra Trade	127	138	157	165	172	185
Excluding EC-Intra Trade	12	12	6	11	14	13
Romania	45	45	50	0	0	0
Turkey	22	20	16	7	5	5
India	9	7	7	7	6	7
Korea, Rep. of	16	25	26	22	14	15
Australia	207	202	193	241	264	248
New Zealand	490	466	502	435	445	443
Other Countries	19	16	13	12	14	17
T O T A L	942	927	971	899	932	932
Excluding EC-Intra Trade	827	801	820	745	774	760
CONSUMPTION						
United States	164	175	184	191	192	190
Mexico	75	76	83	86	90	95
European Community (EC-12)	1,207	1,259	1,325	1,406	1,413	1,433
Bulgaria	97	88	78	77	70	70
Former USSR	939	977	1,014	1,022	985	930
Turkey	355	360	369	368	360	355
Egypt	84	82	83	85	82	83
South Africa, Rep. of	203	197	204	239	237	237
India	541	537	553	563	573	578
China (Mainland)	715	799	961	1,087	1,128	1,192
Japan	150	160	144	128	125	125
Australia	388	363	383	384	369	394
New Zealand	116	91	81	77	82	75
Other Countries	193	192	204	273	263	245
T O T A L	5,227	5,356	5,666	5,986	5,969	6,002

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BOVINE HIDES AND SKINS SUMMARY
SELECTED COUNTRIES

- - - - 1,000 METRIC TONS - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
PRODUCTION						
United States	1,128	1,022	1,086	1,033	1,045	1,082
Canada	85	82	84	78	73	75
Mexico	122	176	222	181	155	156
Argentina	314	303	304	307	308	300
Brazil	350	390	400	540	545	570
Colombia	86	93	97	105	109	110
European Community (EC-12)	812	770	742	783	805	769
Czechoslovakia	55	58	56	56	50	50
Poland	80	80	80	95	82	74
Yugoslavia	39	39	39	42	37	35
Former USSR	1,060	1,090	1,090	1,050	1,095	1,075
Turkey	62	63	65	67	69	71
South Africa, Rep. of	59	51	55	55	58	61
Japan	46	45	43	43	44	46
Australia	144	139	137	149	147	146
New Zealand	54	41	35	40	44	44
Other Countries	130	132	126	133	126	119
T O T A L	4,626	4,574	4,661	4,757	4,792	4,783
IMPORTS						
United States	23	32	45	35	30	25
Canada	25	22	25	21	20	20
Mexico	30	39	40	52	70	90
Brazil	29	60	60	20	15	30
Venezuela	7	6	0	0	2	4
European Community (EC-12)						
Including EC-Intra Trade	728	704	732	788	759	731
Excluding EC-Intra Trade	249	247	298	319	279	247
Czechoslovakia	145	145	145	115	115	115
Hungary	22	15	13	10	8	8
Poland	41	37	44	6	25	30
Romania	35	40	43	43	30	35
Yugoslavia	15	22	24	25	20	20
Former USSR	2	1	1	1	1	1
Turkey	9	5	6	9	10	10
Taiwan	132	107	80	73	95	89
Hong Kong	53	55	48	54	65	68
Japan	208	230	215	238	210	180
Korea, Rep. of	339	333	355	373	395	410
Other Countries	3	6	2	0	1	3
T O T A L	1,846	1,859	1,878	1,863	1,871	1,869
Excluding EC-Intra Trade	1,367	1,402	1,444	1,390	1,387	1,381
EXPORTS						
United States	654	605	671	675	630	650
Canada	82	80	91	88	80	82
Brazil	30	70	40	78	60	80
Venezuela	0	0	3	18	12	10
European Community (EC-12)						
Including EC-Intra Trade	629	576	559	593	628	602
Excluding EC-Intra Trade	150	127	132	134	150	113
Poland	8	8	5	41	10	10
Former USSR	96	170	180	150	100	125
South Africa, Rep. of	17	11	14	18	19	19
Hong Kong	46	53	46	53	64	68
Korea, Rep. of	0	0	0	3	5	10
Australia	107	130	124	134	137	136
New Zealand	41	26	23	23	33	31
Other Countries	4	3	6	8	5	4
T O T A L	1,714	1,732	1,762	1,882	1,783	1,827
Excluding EC-Intra Trade	1,235	1,283	1,335	1,423	1,305	1,338
CONSUMPTION						
United States	497	449	460	393	445	457
Mexico	152	215	262	233	225	246
Argentina	314	303	304	307	308	300
Brazil	349	380	420	482	500	520
Colombia	85	92	94	100	108	111
European Community (EC-12)	914	901	912	930	928	925
Czechoslovakia	200	203	201	171	165	165
Poland	113	109	119	60	97	94
Romania	60	65	64	69	50	48
Yugoslavia	54	61	63	62	55	54
Former USSR	966	921	911	901	996	951
Turkey	70	70	70	74	78	82
South Africa, Rep. of	42	40	41	37	39	42
Taiwan	133	108	81	74	96	90
Japan	250	260	270	270	245	240
Korea, Rep. of	358	354	363	380	400	420
Other Countries	187	165	138	132	133	132
T O T A L	4,744	4,696	4,773	4,675	4,868	4,877

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

TALLOW AND GREASE SUMMARY
SELECTED COUNTRIES

- - - - 1,000 METRIC TONS - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
PRODUCTION						
United States	3,190	3,188	3,116	3,067	3,095	3,130
Canada	205	200	203	199	195	200
Mexico	43	54	65	58	55	56
Argentina	289	279	278	282	278	270
Brazil	170	190	272	260	260	273
European Community (EC-12)	1,181	1,127	1,148	1,264	1,258	1,229
Poland	72	74	61	54	65	65
Former USSR	380	390	400	400	360	350
China (Mainland)	10	25	25	45	60	65
Japan	219	218	220	215	188	180
Korea, Rep. of	46	53	60	80	100	100
Australia	350	456	489	540	530	528
New Zealand	132	146	133	110	117	117
Other Countries	133	133	143	168	161	157
T O T A L	6,420	6,533	6,613	6,742	6,722	6,720
IMPORTS						
Mexico	147	164	172	175	180	190
Dominican Republic	26	19	27	25	24	26
El Salvador	34	36	38	45	50	50
Guatemala	31	32	34	29	36	39
Brazil	29	30	20	54	60	60
Colombia	58	80	55	49	59	62
Venezuela	47	54	31	56	60	63
European Community (EC-12)						
Including EC-Intra Trade	807	853	862	917	912	938
Excluding EC-Intra Trade	344	396	421	479	471	492
Former USSR	122	110	157	160	175	175
Turkey	41	39	72	74	70	75
Egypt	150	155	62	20	27	30
Pakistan	95	100	100	100	100	100
China (Mainland)	88	98	110	80	67	70
Taiwan	68	56	68	71	77	80
Japan	94	111	126	127	133	110
Korea, Rep. of	120	110	116	105	105	120
Other Countries	42	44	69	57	55	62
T O T A L	1,999	2,091	2,119	2,144	2,190	2,250
Excluding EC-Intra Trade	1,536	1,634	1,678	1,705	1,744	1,799
EXPORTS						
United States	1,253	1,334	1,229	1,074	1,020	1,030
Canada	154	178	195	202	195	200
Argentina	34	22	18	23	13	5
European Community (EC-12)						
Including EC-Intra Trade	499	520	479	488	492	494
Excluding EC-Intra Trade	39	63	38	51	51	38
Bulgaria	3	3	3	3	3	3
Turkey	10	8	5	9	6	5
Japan	12	7	4	5	3	2
Australia	190	237	214	233	232	230
New Zealand	119	132	130	103	105	110
Other Countries	2	5	5	5	6	5
T O T A L	2,276	2,446	2,282	2,145	2,075	2,084
Excluding EC-Intra Trade	1,816	1,989	1,841	1,708	1,634	1,628
CONSUMPTION						
United States	1,980	1,861	1,897	2,004	2,084	2,100
Mexico	190	218	237	233	235	246
Argentina	255	257	260	259	273	280
Brazil	199	220	292	314	320	333
Colombia	87	93	96	89	93	98
Venezuela	55	64	45	69	72	74
European Community (EC-12)	1,484	1,453	1,537	1,690	1,678	1,671
Poland	72	74	61	54	65	65
Former USSR	501	499	556	559	534	525
Turkey	43	42	76	77	78	83
Egypt	150	155	62	20	27	30
Pakistan	111	113	113	113	113	113
China (Mainland)	98	123	135	125	125	133
Taiwan	68	61	68	71	77	80
Japan	300	310	328	330	320	300
Korea, Rep. of	166	163	176	180	200	220
Australia	160	219	275	307	298	298
Other Countries	268	218	237	248	247	244
T O T A L	6,187	6,143	6,451	6,742	6,839	6,893

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

CATTLE AND BUFFALO INVENTORIES
SELECTED COUNTRIES

1,000 HEAD
- - - - JANUARY 1 - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	10,802	10,863	11,016	11,147	11,198	11,400
Mexico	33,603	35,378	34,999	31,747	29,847	30,157
United States	102,118	99,622	98,065	98,162	98,896	100,110
Subtotal.....	146,523	145,863	144,080	141,056	139,941	141,667
CARIBBEAN						
Dominican Republic	1,990	2,000	1,990	1,986	1,977	1,976
CENTRAL AMERICA						
Costa Rica	1,836	1,753	1,735	1,762	1,762	1,741
El Salvador	1,024	1,101	1,162	1,220	1,242	1,285
Guatemala	2,560	2,550	2,100	1,900	1,695	1,532
Honduras	2,532	2,489	2,457	2,424	2,388	2,356
Subtotal.....	7,952	7,893	7,454	7,306	7,087	6,914
SOUTH AMERICA						
Argentina	51,683	50,782	50,782	50,582	50,080	50,029
Brazil	128,000	130,000	130,500	130,850	131,275	130,700
Colombia	18,819	18,400	17,627	16,835	16,225	16,145
Peru	3,250	3,300	4,000	3,800	3,630	3,510
Uruguay	9,778	10,306	10,548	9,377	9,431	10,058
Venezuela	12,331	12,756	13,095	13,210	13,368	13,648
Subtotal.....	223,861	225,544	226,552	224,654	224,009	224,090
EUROPEAN COMMUNITY						
Belgium-Luxembourg	3,146	3,159	3,174	3,259	3,378	3,267
Denmark	2,490	2,323	2,226	2,232	2,241	2,222
France	22,171	21,052	20,120	19,980	19,886	19,926
Germany	21,109	20,608	20,369	20,287	19,488	17,215
Greece	743	720	723	687	634	616
Ireland	5,626	5,580	5,637	5,899	6,029	6,180
Italy	8,921	8,898	8,843	8,853	8,578	8,104
Netherlands	4,922	4,546	4,606	4,731	4,830	4,900
Portugal	1,257	1,332	1,359	1,291	1,281	1,333
Spain	5,003	5,094	5,200	5,331	5,126	5,000
United Kingdom	12,476	11,849	11,902	11,922	11,846	11,698
Subtotal.....	87,864	85,161	84,159	84,472	83,317	80,461
OTHER WESTERN EUROPE						
Austria	2,637	2,586	2,541	2,562	2,584	2,513
Finland	1,485	1,434	1,379	1,363	1,315	1,292
Sweden	1,665	1,667	1,676	1,697	1,660	1,612
Switzerland	1,858	1,808	1,850	1,855	1,829	1,827
Subtotal.....	7,645	7,495	7,446	7,477	7,388	7,244
EASTERN EUROPE						
Bulgaria	1,678	1,649	1,615	1,577	1,524	1,512
Czechoslovakia	5,073	5,044	5,075	5,129	4,923	4,838
Hungary	1,725	1,664	1,690	1,598	1,571	1,500
Poland	10,522	10,200	10,322	10,143	9,024	8,030
Romania	7,225	7,182	6,416	6,283	5,437	5,017
Yugoslavia	5,030	4,881	4,759	4,702	4,527	4,415
Subtotal.....	31,253	30,620	29,877	29,432	27,006	25,312
FORMER USSR	122,103	120,592	119,580	118,400	115,700	112,400
MIDDLE EAST						
Israel	197	188	191	190	186	184
Saudi Arabia	264	281	217	191	176	158
Turkey	14,450	14,000	13,400	12,700	12,200	11,700
Subtotal.....	14,911	14,469	13,808	13,081	12,562	12,042
NORTH AFRICA						
Egypt	6,149	6,182	6,331	6,385	6,408	6,418
OTHER AFRICA						
South Africa, Rep. of	12,002	12,187	12,675	13,398	13,512	13,585
SOUTH ASIA						
India	274,822	265,122	267,620	270,150	272,710	271,437
OTHER ASIA						
China (Mainland)	91,670	94,650	97,948	100,752	102,884	104,214
Taiwan	153	172	176	165	154	158
Japan	4,694	4,667	4,682	4,760	4,863	4,917
Korea, Rep. of	2,807	2,386	2,039	2,051	2,126	2,269
Philippines	4,615	4,590	4,524	4,395	4,387	4,375
Subtotal.....	103,939	106,465	109,369	112,123	114,414	115,933
OCEANIA						
Australia	23,540	23,469	23,938	24,673	25,027	25,075
New Zealand	8,279	7,999	8,058	7,828	8,065	8,085
Subtotal.....	31,819	31,468	31,996	32,501	33,092	33,160
T O T A L	1,072,833	1,061,061	1,062,937	1,062,421	1,059,123	1,052,639

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

CATTLE AND BUFFALO SLAUGHTER
SELECTED COUNTRIES

- - - - 1,000 HEAD - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	3,780	3,703	3,760	3,479	3,235	3,295
Mexico	5,837	8,468	10,702	8,720	7,450	7,500
United States	38,792	37,881	36,328	35,277	34,333	34,824
Subtotal.....	48,409	50,052	50,790	47,476	45,018	45,619
CARIBBEAN						
Dominican Republic	300	350	344	350	344	345
CENTRAL AMERICA						
Costa Rica	489	421	389	408	435	430
El Salvador	113	136	163	163	167	180
Guatemala	297	340	380	370	335	330
Honduras	355	360	370	269	264	261
Subtotal.....	1,254	1,257	1,302	1,210	1,201	1,201
SOUTH AMERICA						
Argentina	12,800	12,200	12,200	12,500	12,650	12,200
Brazil	20,000	22,000	21,000	20,000	20,100	21,000
Colombia	3,349	3,704	3,885	4,191	4,363	4,416
Peru	661	610	716	770	700	650
Uruguay	1,266	1,458	1,827	1,550	1,192	1,295
Venezuela	1,292	1,412	1,543	1,823	1,770	1,730
Subtotal.....	39,368	41,384	41,171	40,834	40,775	41,291
EUROPEAN COMMUNITY						
Belgium-Luxembourg	992	987	855	931	1,126	1,073
Denmark	963	887	819	789	830	820
France	7,774	7,230	6,540	6,761	7,020	6,900
Germany	7,832	7,365	6,894	8,506	7,660	6,450
Greece	431	411	400	412	385	355
Ireland	1,584	1,452	1,366	1,583	1,738	1,829
Italy	4,870	4,919	4,874	4,884	5,000	4,860
Netherlands	2,450	2,216	2,117	2,250	2,522	2,450
Portugal	483	482	582	502	477	480
Spain	1,982	1,984	1,862	2,065	2,000	2,000
United Kingdom	4,071	3,374	3,442	3,525	3,610	3,566
Subtotal.....	33,432	31,307	29,751	32,208	32,368	30,783
OTHER WESTERN EUROPE						
Austria	866	827	781	825	850	810
Finland	615	543	495	506	487	442
Sweden	596	547	585	595	601	589
Switzerland	866	787	796	825	797	803
Subtotal.....	2,943	2,704	2,657	2,751	2,735	2,644
EASTERN EUROPE						
Bulgaria	516	514	648	618	565	565
Czechoslovakia	1,519	1,651	1,601	1,607	1,420	1,420
Hungary	379	343	389	410	411	365
Poland	4,047	3,511	3,355	4,493	4,147	3,480
Romania	1,543	1,547	1,413	2,025	1,440	1,005
Yugoslavia	2,148	2,207	2,167	2,453	2,189	2,118
Subtotal.....	10,152	9,773	9,573	11,606	10,172	8,953
FORMER USSR	40,820	42,572	42,730	43,120	43,500	42,000
MIDDLE EAST						
Israel	111	105	105	110	106	105
Saudi Arabia	125	135	135	130	140	145
Turkey	4,300	4,350	4,400	4,500	4,600	4,700
Subtotal.....	4,536	4,590	4,640	4,740	4,846	4,950
NORTH AFRICA						
Egypt	2,076	2,055	2,057	2,187	2,210	2,240
OTHER AFRICA						
South Africa, Rep. of	2,646	2,396	2,491	2,934	3,082	3,216
SOUTH ASIA						
India	20,200	17,820	18,470	18,677	19,012	18,825
OTHER ASIA						
China (Mainland)	7,403	8,552	9,428	10,883	11,870	13,000
Taiwan	23	26	34	27	28	29
Japan	1,507	1,461	1,392	1,390	1,450	1,495
Korea, Rep. of	1,006	852	567	555	550	700
Philippines	668	736	780	763	750	750
Subtotal.....	10,607	11,627	12,201	13,618	14,648	15,974
OCEANIA						
Australia	8,049	7,770	7,486	8,166	8,009	7,960
New Zealand	3,328	3,042	3,178	2,780	2,901	2,980
Subtotal.....	11,377	10,812	10,664	10,946	10,910	10,940
T O T A L	228,120	228,699	228,841	232,657	230,821	228,981

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BEEF AND VEAL BEGINNING STOCKS
SELECTED COUNTRIES

1,000 METRIC TONS
JANUARY 1
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	14	12	19	17	15	12
United States	190	177	193	154	183	193
Subtotal.....	204	189	212	171	198	205
CARIBBEAN						
Dominican Republic	2	2	2	2	2	2
SOUTH AMERICA						
Argentina	80	80	66	56	35	15
Brazil	0	30	5	10	30	80
Colombia	0	2	5	3	5	5
Peru	2	4	3	2	3	3
Uruguay	19	21	15	21	0	0
Venezuela	0	21	26	15	8	12
Subtotal.....	101	158	120	107	81	115
EUROPEAN COMMUNITY						
Belgium-Luxembourg	13	12	6	1	0	8
Denmark	48	50	37	17	30	55
France	167	193	185	20	71	81
Germany	189	269	284	156	209	110
Greece	0	2	0	2	4	4
Ireland	273	257	309	261	349	473
Italy	93	100	40	30	45	80
Netherlands	35	25	37	1	1	1
Portugal	20	15	16	30	45	46
Spain	20	20	5	3	13	20
United Kingdom	96	84	78	50	140	180
Subtotal.....	954	1,027	997	571	907	1,058
OTHER WESTERN EUROPE						
Austria	4	3	1	0	1	1
Finland	7	5	5	7	7	7
Sweden	5	4	5	6	3	3
Switzerland	4	0	1	1	4	5
Subtotal.....	20	12	12	14	15	16
EASTERN EUROPE						
Bulgaria	10	10	10	5	5	5
Czechoslovakia	5	5	5	5	5	5
Hungary	13	11	9	7	15	23
Poland	73	50	12	15	20	10
Romania	20	20	15	10	30	20
Yugoslavia	55	83	80	99	128	99
Subtotal.....	176	179	131	141	203	162
MIDDLE EAST						
Israel	9	10	16	13	8	11
Saudi Arabia	0	21	21	14	10	8
Turkey	28	30	20	15	15	20
Subtotal.....	37	61	57	42	33	39
OTHER AFRICA						
South Africa, Rep. of	8	0	6	7	10	10
OTHER ASIA						
Hong Kong	6	6	7	6	6	6
Japan	44	44	94	154	165	120
Korea, Rep. of	12	8	7	16	20	12
Philippines	5	8	4	6	4	1
Singapore	1	1	1	1	1	1
Subtotal.....	68	67	113	183	196	140
OCEANIA						
Australia	50	52	33	26	29	36
New Zealand	31	34	35	25	27	11
Subtotal.....	81	86	68	51	56	47
T O T A L	1,651	1,781	1,718	1,289	1,701	1,794

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BEEF AND VEAL PRODUCTION
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	977	973	980	924	879	895
Mexico	1,205	1,754	2,140	1,790	1,580	1,600
United States	10,884	10,880	10,633	10,464	10,530	10,760
Subtotal.....	13,066	13,607	13,753	13,178	12,989	13,255
CARIBBEAN						
Dominican Republic	53	61	60	51	52	54
CENTRAL AMERICA						
Costa Rica	91	86	81	85	91	90
El Salvador	20	23	27	27	28	30
Guatemala	54	61	61	59	53	52
Honduras	25	25	24	23	22	22
Subtotal.....	190	195	193	194	194	194
SOUTH AMERICA						
Argentina	2,700	2,610	2,600	2,650	2,640	2,560
Brazil	4,000	4,100	3,800	3,600	3,700	3,840
Colombia	654	707	741	795	823	839
Peru	107	116	112	116	104	100
Uruguay	277	321	376	349	280	304
Venezuela	276	307	337	382	370	362
Subtotal.....	8,014	8,161	7,966	7,892	7,917	8,005
EUROPEAN COMMUNITY						
Belgium-Luxembourg	327	323	312	323	379	358
Denmark	235	217	205	202	212	210
France	1,912	1,780	1,670	1,753	1,800	1,850
Germany	2,053	1,978	1,963	2,112	2,200	1,850
Greece	86	82	82	82	80	76
Ireland	477	458	432	514	550	552
Italy	1,205	1,164	1,140	1,165	1,200	1,165
Netherlands	535	506	485	521	595	580
Portugal	105	111	131	114	108	110
Spain	449	450	451	513	490	490
United Kingdom	1,088	945	980	1,003	1,013	1,009
Subtotal.....	8,472	8,014	7,851	8,302	8,627	8,250
OTHER WESTERN EUROPE						
Austria	230	222	213	223	230	222
Finland	123	111	107	117	118	108
Sweden	135	127	139	145	149	146
Switzerland	173	157	157	164	165	167
Subtotal.....	661	617	616	649	662	643
EASTERN EUROPE						
Bulgaria	132	131	136	137	126	126
Czechoslovakia	458	451	488	454	391	390
Hungary	114	93	108	110	111	100
Poland	835	783	729	838	726	654
Romania	240	230	210	370	280	205
Yugoslavia	317	301	309	352	320	310
Subtotal.....	2,096	1,989	1,980	2,261	1,954	1,785
FORMER USSR	8,288	8,600	8,800	8,814	8,160	7,700
MIDDLE EAST						
Israel	39	35	39	40	38	37
Saudi Arabia	18	24	25	28	30	40
Turkey	245	255	270	285	300	315
Subtotal.....	302	314	334	353	368	392
NORTH AFRICA						
Egypt	384	381	386	408	420	410
OTHER AFRICA						
South Africa, Rep. of	583	553	582	661	678	691
SOUTH ASIA						
India	2,020	1,782	1,847	1,868	1,901	1,883
OTHER ASIA						
China (Mainland)	792	958	1,072	1,250	1,370	1,500
Taiwan	4	5	6	5	5	5
Japan	565	570	548	549	573	590
Korea, Rep. of	206	175	124	131	130	165
Philippines	112	124	132	132	129	131
Subtotal.....	1,679	1,832	1,882	2,067	2,207	2,391
OCEANIA						
Australia	1,549	1,533	1,565	1,718	1,675	1,699
New Zealand	563	562	550	471	532	548
Subtotal.....	2,112	2,095	2,115	2,189	2,207	2,247
T O T A L	47,920	48,201	48,365	48,887	48,336	47,900

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BEEF AND VEAL IMPORTS
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	135	153	158	185	210	210
Mexico	4	15	40	60	100	140
United States	1,040	1,092	988	1,069	1,091	1,048
Subtotal.....	1,179	1,260	1,186	1,314	1,401	1,398
SOUTH AMERICA						
Argentina	0	0	0	0	2	15
Brazil	167	26	218	250	150	70
Peru	25	5	4	5	6	10
Venezuela	21	8	3	2	10	10
Subtotal.....	213	39	225	257	168	105
EUROPEAN COMMUNITY						
Belgium-Luxembourg	29	21	23	24	21	21
Denmark	24	25	29	40	50	55
France	306	319	355	396	435	430
Germany	312	355	355	382	390	400
Greece	171	168	160	135	140	147
Ireland	13	28	24	15	13	13
Italy	468	417	473	451	525	460
Netherlands	69	76	68	85	100	80
Portugal	23	28	23	44	39	36
Spain	34	39	42	45	60	55
United Kingdom	375	418	375	277	305	300
Subtotal.....	1,824	1,894	1,927	1,894	2,078	1,997
Excluding EC Intra-Trade	410	467	449	401	405	410
OTHER WESTERN EUROPE						
Austria	2	3	3	2	2	2
Finland	0	3	2	1	1	0
Sweden	15	21	13	13	14	15
Switzerland	14	16	12	12	10	8
Subtotal.....	31	43	30	28	27	25
EASTERN EUROPE						
Czechoslovakia	10	10	20	10	4	0
Hungary	13	18	15	4	5	8
Poland	0	44	90	3	30	50
Romania	0	0	0	80	10	20
Yugoslavia	41	53	60	72	20	18
Subtotal.....	64	125	185	169	69	96
FORMER USSR	142	117	150	250	400	430
MIDDLE EAST						
Israel	41	44	38	31	42	36
Saudi Arabia	55	26	15	18	20	22
Turkey	23	12	7	10	15	15
Subtotal.....	119	82	60	59	77	73
NORTH AFRICA						
Egypt	170	150	181	120	115	135
OTHER AFRICA						
South Africa, Republic of	48	68	58	33	23	25
OTHER ASIA						
Taiwan	39	46	46	46	53	54
Hong Kong	79	90	80	81	83	84
Japan	315	380	498	537	515	580
Korea, Republic of	0	20	83	117	172	210
Philippines	6	7	13	11	12	15
Singapore	15	15	16	16	18	19
Subtotal.....	454	558	736	808	853	962
T O T A L	4,244	4,336	4,738	4,932	5,211	5,246
Excluding EC Intra-trade	2,830	2,909	3,260	3,432	3,531	3,653

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BEEF AND VEAL EXPORTS
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	93	86	108	110	106	110
Mexico	0	0	4	5	8	10
United States	277	313	464	456	539	612
Subtotal.....	370	399	576	571	653	732
CARIBBEAN						
Dominican Republic	9	15	12	13	14	14
CENTRAL AMERICA						
Costa Rica	27	23	21	19	23	20
El Salvador	2	1	1	1	0	1
Guatemala	12	10	16	18	13	13
Honduras	6	6	9	11	13	13
Subtotal.....	47	40	47	49	49	47
SOUTH AMERICA						
Argentina	287	320	360	451	372	280
Brazil	302	550	323	230	300	380
Colombia	12	4	9	11	16	15
Uruguay	93	132	177	192	110	110
Venezuela	0	6	1	2	2	2
Subtotal.....	694	1,012	870	886	800	787
EUROPEAN COMMUNITY						
Belgium-Luxembourg	107	116	117	129	177	168
Denmark	175	161	148	122	129	162
France	470	445	520	427	525	575
Germany	507	658	837	911	980	600
Greece	0	2	1	0	0	0
Ireland	431	366	438	381	380	520
Italy	111	93	78	66	150	100
Netherlands	320	314	324	333	425	390
Portugal	1	1	1	0	0	0
Spain	10	22	40	61	54	56
United Kingdom	192	135	154	123	137	150
Subtotal.....	2,324	2,313	2,658	2,553	2,957	2,721
Excluding EC Intra-Trade	910	886	1,180	1,060	1,284	1,133
OTHER WESTERN EUROPE						
Austria	63	58	49	56	64	55
Finland	22	11	6	10	11	0
Sweden	6	5	7	12	10	5
Switzerland	6	1	1	1	1	2
Subtotal.....	97	75	63	79	86	62
EASTERN EUROPE						
Bulgaria	12	12	8	6	6	3
Czechoslovakia	45	40	50	50	50	50
Hungary	44	37	47	35	39	39
Poland	53	55	48	57	10	20
Romania	115	120	100	0	5	0
Yugoslavia	25	32	28	25	19	35
Subtotal.....	294	296	281	173	129	147
FORMER USSR	7	7	5	5	0	0
MIDDLE EAST						
Israel	7	2	7	1	0	0
Saudi Arabia	0	1	0	0	0	1
Turkey	1	1	1	1	10	1
Subtotal.....	8	4	8	2	10	2
OTHER AFRICA						
South Africa, Republic of	1	1	1	1	1	1
SOUTH ASIA						
India	134	132	126	126	140	132
OTHER ASIA						
China (Mainland)	34	54	57	155	219	250
Hong Kong	1	1	1	1	3	3
Singapore	1	1	3	3	3	3
Subtotal.....	36	56	61	159	225	256
OCEANIA						
Australia	908	890	872	1,064	1,031	1,032
New Zealand	432	435	435	359	435	448
Subtotal.....	1,340	1,325	1,307	1,423	1,466	1,480
T O T A L	5,361	5,675	6,015	6,040	6,530	6,381
Excluding EC Intra-trade	3,947	4,248	4,537	4,547	4,857	4,793

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BEEF AND VEAL CONSUMPTION
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	1,021	1,033	1,032	1,001	986	995
Mexico	1,209	1,769	2,176	1,845	1,672	1,730
United States	11,660	11,643	11,196	11,048	11,072	11,240
Subtotal.....	13,890	14,445	14,404	13,894	13,730	13,965
CARIBBEAN						
Dominican Republic	44	46	48	38	38	40
CENTRAL AMERICA						
Costa Rica	64	63	60	66	68	70
El Salvador	18	22	26	26	28	29
Guatemala	42	51	45	41	40	39
Honduras	19	19	15	12	9	9
Subtotal.....	143	155	146	145	145	147
SOUTH AMERICA						
Argentina	2,413	2,304	2,250	2,220	2,290	2,280
Brazil	3,835	3,601	3,690	3,600	3,500	3,580
Colombia	640	700	734	782	807	824
Peru	130	122	117	120	110	110
Uruguay	182	195	193	178	170	194
Venezuela	276	304	350	389	374	369
Subtotal.....	7,476	7,226	7,334	7,289	7,251	7,357
EUROPEAN COMMUNITY						
Belgium-Luxembourg	250	234	223	219	215	212
Denmark	82	94	106	107	108	108
France	1,722	1,662	1,670	1,671	1,700	1,700
Germany	1,756	1,673	1,609	1,512	1,709	1,710
Greece	255	250	239	215	220	222
Ireland	75	68	66	60	59	60
Italy	1,555	1,548	1,545	1,535	1,540	1,540
Netherlands	294	256	265	273	270	270
Portugal	132	137	139	143	146	149
Spain	473	482	455	487	489	495
United Kingdom	1,283	1,234	1,229	1,067	1,141	1,189
Subtotal.....	7,877	7,638	7,546	7,289	7,597	7,655
OTHER WESTERN EUROPE						
Austria	170	169	168	168	168	169
Finland	103	103	101	108	108	108
Sweden	145	142	144	149	153	156
Switzerland	185	171	168	172	173	174
Subtotal.....	603	585	581	597	602	607
EASTERN EUROPE						
Bulgaria	120	119	133	131	120	123
Czechoslovakia	423	421	458	414	345	340
Hungary	85	76	78	71	69	69
Poland	805	810	782	779	756	689
Romania	125	115	115	430	295	230
Yugoslavia	305	325	322	370	350	330
Subtotal.....	1,863	1,866	1,888	2,195	1,935	1,781
FORMER USSR	8,423	8,710	8,945	9,059	8,560	8,130
MIDDLE EAST						
Israel	73	71	73	75	77	77
Saudi Arabia	52	49	47	50	52	57
Turkey	265	276	281	294	300	329
Subtotal.....	390	396	401	419	429	463
NORTH AFRICA						
Egypt	554	531	567	528	535	545
OTHER AFRICA						
South Africa, Rep. of	638	614	638	690	700	720
SOUTH ASIA						
India	1,886	1,650	1,721	1,742	1,761	1,751
OTHER ASIA						
China (Mainland)	758	904	1,015	1,095	1,151	1,250
Taiwan	43	51	52	51	58	59
Hong Kong	78	88	80	80	80	81
Japan	880	900	986	1,075	1,133	1,190
Korea, Rep. of	210	196	198	244	310	370
Philippines	115	135	143	145	144	145
Singapore	14	14	13	13	15	16
Subtotal.....	2,098	2,288	2,487	2,703	2,891	3,111
OCEANIA						
Australia	639	662	700	651	637	673
New Zealand	128	126	125	110	113	110
Subtotal.....	767	788	825	761	750	783
T O T A L	46,652	46,938	47,531	47,349	46,924	47,055

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

HOG INVENTORIES
SELECTED COUNTRIES

1,000 HEAD
- - - - JANUARY 1 - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	9,996	10,748	11,018	10,737	10,608	10,780
Mexico	12,357	10,879	9,003	8,563	8,593	9,863
United States	51,001	54,384	55,469	53,821	54,477	56,974
Subtotal.....	73,354	76,011	75,490	73,121	73,678	77,617
CARIBBEAN						
Dominican Republic	276	285	293	306	306	305
CENTRAL AMERICA						
Guatemala	1,110	1,120	1,110	1,100	1,110	1,115
SOUTH AMERICA						
Brazil	31,700	31,700	31,700	33,200	32,500	33,100
Colombia	2,434	2,458	2,393	2,434	2,398	2,369
Venezuela	3,091	3,100	2,961	2,326	1,971	1,802
Subtotal.....	37,225	37,258	37,054	37,960	36,869	37,271
EUROPEAN COMMUNITY						
Belgium-Luxembourg	5,838	5,958	6,306	6,510	6,341	6,554
Denmark	9,422	9,048	9,105	9,120	9,282	9,767
France	12,063	11,915	11,866	11,860	11,860	11,560
Germany	37,343	36,173	35,235	34,178	30,818	26,251
Greece	1,226	1,269	1,114	1,100	1,141	1,150
Ireland	980	960	961	999	1,069	1,099
Italy	9,278	9,383	9,360	9,261	9,119	9,005
Netherlands	14,063	14,226	13,820	13,638	13,788	13,000
Portugal	2,454	2,450	2,326	2,531	2,664	2,835
Spain	15,782	16,941	16,100	16,910	16,001	16,100
United Kingdom	7,955	7,915	7,626	7,383	7,379	7,490
Subtotal.....	116,404	116,238	113,819	113,490	109,462	104,811
OTHER WESTERN EUROPE						
Austria	3,800	3,933	3,874	3,773	3,688	3,600
Finland	1,309	1,291	1,327	1,348	1,290	1,231
Sweden	2,235	2,274	2,264	2,264	2,170	2,143
Switzerland	1,917	1,923	1,869	1,787	1,723	1,678
Subtotal.....	9,261	9,421	9,334	9,172	8,871	8,652
EASTERN EUROPE						
Bulgaria	4,050	4,034	4,132	4,352	4,340	4,390
Czechoslovakia	6,833	7,235	7,348	7,498	7,090	6,800
Hungary	8,687	8,216	8,327	7,660	8,000	7,400
Poland	19,619	19,373	19,605	18,685	19,739	20,722
Romania	14,711	15,224	14,350	11,659	12,066	11,940
Yugoslavia	8,459	8,323	7,396	7,231	7,358	7,050
Subtotal.....	62,359	62,405	61,158	57,085	58,593	58,302
FORMER USSR	79,501	77,403	78,143	78,409	75,583	71,200
OTHER ASIA						
China (Mainland)	337,191	327,730	342,218	352,810	362,410	361,000
Taiwan	7,057	7,129	6,954	7,783	8,565	10,089
Japan	11,354	11,725	11,866	11,816	11,335	10,800
Korea, Republic of	3,347	4,281	4,852	4,801	4,528	5,046
Philippines	7,114	7,581	7,909	8,124	8,007	8,150
Subtotal.....	366,063	358,446	373,799	385,334	394,845	395,085
OCEANIA						
Australia	2,640	2,719	2,766	2,765	1,881	1,076
New Zealand	435	426	414	380	395	405
Subtotal.....	3,075	3,145	3,180	3,145	2,276	1,481
T O T A L	748,628	741,732	753,380	759,122	761,593	755,839

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

HOG SLAUGHTER
SELECTED COUNTRIES

- - - - 1,000 HEAD - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	14,854	15,526	15,530	14,797	14,535	14,900
Mexico	13,200	13,200	12,600	11,000	11,350	11,500
United States	81,422	88,136	89,006	85,431	88,436	94,190
Subtotal.....	109,476	116,862	117,136	111,228	114,321	120,590
CARIBBEAN						
Dominican Republic	329	325	274	282	287	291
CENTRAL AMERICA						
Guatemala	470	490	480	480	485	490
SOUTH AMERICA						
Brazil	12,500	11,500	11,000	11,200	11,400	11,500
Colombia	1,873	1,930	1,856	1,757	1,849	1,881
Venezuela	2,400	2,541	2,325	1,705	1,720	1,780
Subtotal.....	16,773	15,971	15,181	14,662	14,969	15,161
EUROPEAN COMMUNITY						
Belgium-Luxembourg	9,160	9,294	9,490	8,525	9,897	10,046
Denmark	16,080	16,199	15,972	16,425	16,901	17,560
France	19,960	20,741	21,130	21,304	21,800	21,900
Germany	53,605	53,104	49,535	50,420	43,400	41,000
Greece	2,370	2,309	2,260	2,195	2,250	2,260
Ireland	2,246	2,295	2,228	2,384	2,500	2,600
Italy	11,200	11,737	11,972	12,134	12,000	12,000
Netherlands	18,800	20,061	19,645	19,942	18,900	19,150
Portugal	3,156	3,066	2,786	3,391	3,400	3,405
Spain	20,090	22,833	22,833	23,657	24,700	24,880
United Kingdom	15,926	15,782	14,514	14,205	14,450	14,600
Subtotal.....	172,593	177,421	172,365	174,582	170,198	169,401
OTHER WESTERN EUROPE						
Austria	5,126	5,264	5,295	5,305	5,292	5,293
Finland	2,264	2,174	2,183	2,351	2,368	2,360
Sweden	3,629	3,720	3,835	3,660	3,415	3,320
Switzerland	3,386	3,354	3,521	3,478	3,461	3,540
Subtotal.....	14,405	14,512	14,834	14,794	14,536	14,513
EASTERN EUROPE						
Bulgaria	5,945	5,777	5,416	5,978	5,870	5,978
Czechoslovakia	8,122	8,986	9,100	9,225	8,660	8,660
Hungary	11,381	10,549	11,546	10,207	9,930	8,050
Poland	19,145	20,056	20,134	19,598	22,000	23,000
Romania	14,176	14,744	12,191	9,568	9,120	8,940
Yugoslavia	13,845	14,156	13,758	13,835	12,850	13,100
Subtotal.....	72,614	74,268	72,145	68,411	68,430	67,728
FORMER USSR	75,085	75,000	75,000	80,642	76,600	72,500
OTHER ASIA						
China (Mainland)	261,810	275,761	290,231	309,910	315,086	316,000
Taiwan	11,296	11,021	11,078	12,122	13,400	14,500
Japan	21,428	21,233	21,417	20,904	20,000	19,500
Korea, Republic of	7,540	8,284	9,458	8,605	8,700	9,700
Philippines	8,905	10,114	11,407	12,300	12,700	13,000
Singapore	1,107	1,149	1,134	1,152	1,160	1,180
Subtotal.....	312,086	327,562	344,725	364,993	371,046	373,880
OCEANIA						
Australia	4,705	4,814	5,010	4,910	4,900	4,990
New Zealand	769	756	779	762	745	740
Subtotal.....	5,474	5,570	5,789	5,672	5,645	5,730
T O T A L	779,305	807,981	817,929	835,746	836,517	840,284

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

PORK BEGINNING STOCKS
SELECTED COUNTRIES

1,000 METRIC TONS
JANUARY 1

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	8	8	13	12	9	10
United States	115	163	198	142	134	178
Subtotal.....	123	171	211	154	143	188
SOUTH AMERICA						
Brazil	10	20	5	5	9	4
Colombia	0	1	1	1	1	1
Venezuela	1	1	4	15	12	7
Subtotal.....	11	22	10	21	22	12
EUROPEAN COMMUNITY						
Belgium-Luxembourg	7	9	8	0	0	10
France	5	5	5	0	0	0
Germany	8	14	39	30	24	3
Greece	0	2	0	2	2	2
Italy	75	45	21	20	55	60
Netherlands	12	4	10	5	5	5
Portugal	16	15	5	4	11	10
United Kingdom	35	30	27	20	22	20
Subtotal.....	158	124	115	81	119	110
OTHER WESTERN EUROPE						
Austria	0	1	1	0	1	1
Finland	9	7	6	8	8	8
Sweden	5	5	4	4	2	1
Switzerland	0	1	1	1	1	1
Subtotal.....	14	14	12	13	12	11
EASTERN EUROPE						
Bulgaria	10	10	10	10	10	0
Czechoslovakia	5	5	5	5	5	25
Hungary	5	8	10	17	43	30
Poland	165	125	124	67	42	52
Romania	25	25	15	25	30	25
Yugoslavia	154	177	152	171	186	111
Subtotal.....	364	350	316	295	316	243
OTHER ASIA						
Hong Kong	8	8	9	8	8	8
Japan	87	87	86	114	88	70
Korea, Rep. of	0	0	0	1	0	0
Philippines	7	2	4	12	8	9
Singapore	2	2	2	2	2	2
Subtotal.....	104	99	101	137	106	89
OCEANIA						
New Zealand	2	2	2	3	3	2
T O T A L	776	782	767	704	721	655

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

PORK PRODUCTION
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	1,131	1,188	1,184	1,134	1,134	1,140
Mexico	950	964	910	792	820	825
United States	6,519	7,114	7,173	6,964	7,258	7,758
Subtotal.....	8,600	9,266	9,267	8,890	9,212	9,723
CARIBBEAN						
Dominican Republic	15	16	14	13	14	15
CENTRAL AMERICA						
Guatemala	14	14	14	14	14	14
SOUTH AMERICA						
Brazil	1,200	1,100	950	1,050	1,100	1,150
Colombia	122	131	140	141	137	132
Venezuela	139	148	132	99	101	105
Subtotal.....	1,461	1,379	1,222	1,290	1,338	1,387
EUROPEAN COMMUNITY						
Belgium-Luxembourg	788	813	831	770	901	914
Denmark	1,149	1,168	1,165	1,207	1,255	1,325
France	1,737	1,804	1,840	1,870	1,890	1,900
Germany	4,170	4,159	4,001	3,949	3,325	3,150
Greece	164	160	151	147	151	152
Ireland	143	148	144	159	170	179
Italy	1,190	1,269	1,295	1,333	1,320	1,320
Netherlands	1,524	1,632	1,636	1,661	1,610	1,625
Portugal	217	211	216	243	244	244
Spain	1,489	1,722	1,722	1,788	1,850	1,900
United Kingdom	1,025	1,048	978	957	987	1,005
Subtotal.....	13,596	14,134	13,979	14,084	13,703	13,714
OTHER WESTERN EUROPE						
Austria	388	399	404	406	405	405
Finland	175	168	173	186	184	182
Sweden	289	300	308	293	275	269
Switzerland	278	279	280	270	265	268
Subtotal.....	1,130	1,146	1,165	1,155	1,129	1,124
EASTERN EUROPE						
Bulgaria	416	404	424	422	400	420
Czechoslovakia	843	938	960	942	894	894
Hungary	1,064	986	1,079	970	893	725
Poland	1,745	1,845	1,870	1,870	2,085	2,185
Romania	900	840	600	620	600	590
Yugoslavia	871	819	791	799	720	740
Subtotal.....	5,839	5,832	5,724	5,623	5,592	5,554
FORMER USSR	6,324	6,600	6,700	6,646	6,150	5,550
OTHER ASIA						
China (Mainland)	18,349	20,176	21,228	22,811	23,009	23,100
Taiwan	938	911	917	1,009	1,115	1,200
Hong Kong	30	34	30	20	18	19
Japan	1,581	1,578	1,594	1,555	1,490	1,450
Korea, Rep. of	470	541	606	550	530	610
Philippines	490	540	615	665	690	710
Singapore	73	76	75	76	77	79
Subtotal.....	21,931	23,856	25,065	26,686	26,929	27,168
OCEANIA						
Australia	283	298	302	319	325	335
New Zealand	44	43	44	43	42	41
Subtotal.....	327	341	346	362	367	376
T O T A L	59,237	62,584	63,496	64,763	64,448	64,625

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

PORK IMPORTS
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	22	15	12	12	13	15
Mexico	0	16	27	17	40	60
United States	542	515	406	407	352	354
Subtotal.....	564	546	445	436	405	429
SOUTH AMERICA						
Brazil	0	0	60	2	2	1
EUROPEAN COMMUNITY						
Belgium-Luxembourg	32	39	41	70	50	50
Denmark	2	9	14	14	12	12
France	430	447	445	440	445	440
Germany	543	612	611	645	760	850
Greece	60	50	57	59	60	61
Ireland	17	18	23	18	16	16
Italy	463	465	504	522	530	520
Netherlands	37	53	48	52	75	65
Portugal	9	25	30	22	19	19
Spain	45	39	67	64	70	70
United Kingdom	530	532	540	490	472	485
Subtotal.....	2,168	2,289	2,380	2,396	2,509	2,588
Excluding EC Intra-Trade	113	131	110	109	132	115
OTHER WESTERN EUROPE						
Austria	0	0	1	1	1	1
Finland	0	1	1	0	0	0
Sweden	13	16	15	16	19	20
Switzerland	6	2	2	5	5	7
Subtotal.....	19	19	19	22	25	28
EASTERN EUROPE						
Czechoslovakia	5	5	5	5	0	0
Poland	14	6	20	36	60	10
Romania	0	0	0	70	10	15
Yugoslavia	14	42	43	84	20	15
Subtotal.....	33	53	68	195	90	40
FORMER USSR	318	218	220	280	320	350
OTHER ASIA						
Hong Kong	202	223	217	230	203	208
Japan	401	461	491	488	565	615
Korea, Republic of	0	0	0	3	22	0
Philippines	1	2	3	1	2	2
Singapore	21	17	32	27	25	26
Subtotal.....	625	703	743	749	817	851
OCEANIA						
New Zealand	2	3	2	2	2	3
T O T A L	3,729	3,831	3,937	4,082	4,170	4,290
Excluding EC Intra-trade	1,674	1,673	1,667	1,795	1,793	1,817

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

PORK EXPORTS
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	301	319	305	314	275	300
Mexico	0	0	0	0	1	2
United States	49	88	119	108	118	127
Subtotal.....	350	407	424	422	394	429
SOUTH AMERICA						
Brazil	10	17	14	13	17	20
EUROPEAN COMMUNITY						
Belgium-Luxembourg	320	344	369	359	465	493
Denmark	811	844	842	873	922	995
France	129	180	190	210	240	240
Germany	413	416	213	356	245	130
Ireland	42	42	45	53	62	70
Italy	57	58	37	40	45	50
Netherlands	939	990	1,027	1,056	1,020	1,020
Spain	1	2	4	5	33	37
United Kingdom	50	59	58	58	80	57
Subtotal.....	2,762	2,935	2,785	3,010	3,112	3,092
Excluding EC Intra-Trade	706	776	513	710	735	634
OTHER WESTERN EUROPE						
Austria	0	5	6	3	1	0
Finland	17	9	14	23	19	15
Sweden	36	40	46	39	18	7
Switzerland	0	0	1	1	1	1
Subtotal.....	53	54	67	66	39	23
EASTERN EUROPE						
Bulgaria	4	5	5	5	5	0
Czechoslovakia	25	35	40	40	40	40
Hungary	123	133	135	210	200	180
Poland	75	76	73	50	30	50
Romania	150	140	180	0	26	50
Yugoslavia	27	24	20	23	15	30
Subtotal.....	404	413	453	328	316	350
FORMER USSR	6	5	5	5	0	0
OTHER ASIA						
China (Mainland)	200	170	203	235	278	300
Taiwan	194	178	160	225	300	330
Hong Kong	0	0	3	1	1	2
Korea, Republic of	4	10	15	7	4	15
Philippines	0	0	0	0	1	1
Singapore	5	3	17	5	4	5
Subtotal.....	403	361	398	473	588	653
OCEANIA						
Australia	7	10	7	7	7	7
T O T A L	3,995	4,202	4,153	4,324	4,473	4,574
Excluding EC Intra-trade	1,939	2,043	1,881	2,004	2,076	2,096

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

PORK CONSUMPTION
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	852	879	892	835	870	856
Mexico	950	980	937	809	859	883
United States	6,964	7,506	7,516	7,271	7,448	7,993
Subtotal.....	8,766	9,365	9,345	8,915	9,177	9,732
CARIBBEAN						
Dominican Republic	15	16	14	13	14	15
CENTRAL AMERICA						
Guatemala	14	14	14	14	14	14
SOUTH AMERICA						
Brazil	1,180	1,098	996	1,035	1,090	1,130
Colombia	121	131	140	141	137	132
Venezuela	139	145	121	102	106	106
Subtotal.....	1,440	1,374	1,257	1,278	1,333	1,368
EUROPEAN COMMUNITY						
Belgium-Luxembourg	498	509	511	481	476	471
Denmark	340	333	337	348	345	342
France	2,038	2,071	2,100	2,100	2,095	2,100
Germany	4,294	4,330	4,408	4,242	3,861	3,870
Greece	222	212	206	206	211	213
Ireland	118	124	122	124	124	125
Italy	1,626	1,700	1,763	1,780	1,800	1,810
Netherlands	630	689	662	657	665	670
Portugal	227	246	247	258	264	270
Spain	1,533	1,759	1,785	1,847	1,887	1,933
United Kingdom	1,510	1,524	1,467	1,387	1,381	1,433
Subtotal.....	13,036	13,497	13,608	13,430	13,109	13,237
OTHER WESTERN EUROPE						
Austria	387	394	400	403	405	406
Finland	160	161	158	163	165	167
Sweden	266	277	277	272	277	282
Switzerland	283	281	281	274	269	271
Subtotal.....	1,096	1,113	1,116	1,112	1,116	1,126
EASTERN EUROPE						
Bulgaria	412	399	419	417	395	410
Czechoslovakia	823	908	925	907	834	854
Hungary	938	851	937	734	706	555
Poland	1,724	1,776	1,805	1,881	2,105	2,137
Romania	750	710	410	685	589	565
Yugoslavia	835	862	795	845	800	757
Subtotal.....	5,482	5,506	5,291	5,469	5,429	5,278
FORMER USSR	6,636	6,813	6,915	6,921	6,470	5,900
OTHER ASIA						
China (Mainland)	18,149	20,006	21,025	22,576	22,731	22,800
Taiwan	744	733	757	784	815	870
Hong Kong	232	256	245	249	220	225
Japan	1,982	2,040	2,057	2,069	2,073	2,080
Korea, Rep. of	466	531	590	547	548	595
Philippines	496	540	610	670	690	710
Singapore	89	90	90	98	98	99
Subtotal.....	22,158	24,196	25,374	26,993	27,175	27,379
OCEANIA						
Australia	276	288	295	312	318	328
New Zealand	46	46	45	45	45	44
Subtotal.....	322	334	340	357	363	372
T O T A L	58,965	62,228	63,274	64,502	64,200	64,421

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

SHEEP INVENTORIES
SELECTED COUNTRIES

1,000 HEAD
- - - - JANUARY 1 - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
United States	10,572	10,945	10,858	11,363	11,200	10,850
SOUTH AMERICA						
Argentina	28,998	29,202	29,345	28,571	27,552	25,706
Uruguay	0	0	0	0	0	0
Subtotal.....	28,998	29,202	29,345	28,571	27,552	25,706
EUROPEAN COMMUNITY						
Belgium-Luxembourg	149	160	156	158	163	163
Denmark	70	73	86	100	111	125
France	10,580	10,360	11,500	11,500	11,500	11,295
Germany	4,030	4,070	4,098	4,136	3,239	2,521
Greece	10,000	10,512	10,694	10,150	9,759	9,694
Ireland	3,672	4,301	4,991	5,782	6,001	6,236
Italy	11,451	11,457	11,623	11,695	11,575	11,775
Netherlands	985	1,169	1,405	1,702	1,878	1,900
Portugal	3,118	3,180	3,187	3,347	3,413	3,547
Spain	20,000	20,310	23,797	25,447	24,037	24,500
United Kingdom	25,976	27,820	29,045	29,521	29,954	30,043
Subtotal.....	90,031	93,412	100,582	103,538	101,630	101,799
EASTERN EUROPE						
Bulgaria	9,563	8,886	8,593	7,988	7,309	7,241
Czechoslovakia	1,104	1,075	1,047	1,051	1,087	1,087
Hungary	2,337	2,336	2,216	2,069	1,865	1,723
Poland	4,725	4,075	4,300	4,196	3,798	2,900
Romania	18,762	18,900	16,210	15,442	13,886	13,466
Yugoslavia	7,819	7,824	7,564	7,596	7,431	7,264
Subtotal.....	44,310	43,096	39,930	38,342	35,376	33,681
FORMER USSR	142,210	140,783	140,684	138,400	133,300	128,000
MIDDLE EAST						
Turkey	46,800	46,400	45,700	45,300	45,000	44,600
NORTH AFRICA						
Egypt	3,291	3,370	3,451	3,534	3,554	3,439
OTHER AFRICA						
South Africa, Rep. of	29,753	29,640	30,935	32,665	32,580	32,500
SOUTH ASIA						
India	50,722	45,007	46,216	47,277	48,248	48,178
OTHER ASIA						
China (Mainland)	166,220	180,340	201,527	211,642	210,021	208,424
OCEANIA						
Australia	158,800	162,500	171,292	177,841	173,396	157,222
New Zealand	69,204	64,244	64,600	60,569	57,852	57,740
Subtotal.....	228,004	226,744	235,892	238,410	231,248	214,962
T O T A L	840,911	848,939	885,120	899,042	879,709	852,139

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

SHEEP SLAUGHTER
SELECTED COUNTRIES

- - - - 1,000 HEAD - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
United States	5,312	5,392	5,565	5,750	5,820	5,800
SOUTH AMERICA						
Argentina	5,000	5,300	6,000	5,800	5,600	5,700
EUROPEAN COMMUNITY						
Belgium-Luxembourg	309	301	297	329	295	290
Denmark	53	49	54	79	90	100
France	8,306	9,100	9,540	11,158	11,200	11,200
Germany	2,771	2,821	2,068	2,480	2,350	2,100
Greece	7,200	7,600	8,432	8,000	7,750	7,700
Ireland	2,070	2,139	2,848	3,886	4,280	4,400
Italy	7,550	7,985	8,602	9,025	9,000	9,100
Netherlands	406	455	524	634	710	740
Portugal	2,285	2,454	2,691	2,348	2,330	2,328
Spain	17,514	18,566	18,575	19,003	20,000	20,230
United Kingdom	15,780	17,114	19,619	20,012	20,800	20,740
Subtotal.....	64,244	68,584	73,250	76,954	78,805	78,928
EASTERN EUROPE						
Bulgaria	5,757	4,995	4,786	4,720	4,000	4,000
Czechoslovakia	280	280	280	280	280	280
Hungary	330	307	322	320	320	310
Poland	1,654	1,408	1,347	1,687	2,048	1,100
Romania	6,100	5,800	7,118	8,166	6,920	6,400
Yugoslavia	5,253	5,476	5,285	5,279	5,125	4,990
Subtotal.....	19,374	18,266	19,138	20,452	18,693	17,080
FORMER USSR	58,195	59,500	59,184	64,500	63,000	62,500
MIDDLE EAST						
Turkey	24,100	23,800	23,300	23,400	23,300	23,200
NORTH AFRICA						
Egypt	2,131	2,110	2,245	2,295	2,300	2,320
OTHER AFRICA						
South Africa, Republic of	8,274	7,510	8,055	9,860	10,020	9,960
SOUTH ASIA						
India	16,805	14,343	15,336	15,680	15,750	15,840
OTHER ASIA						
China (Mainland)	60,080	67,230	81,229	89,314	90,919	92,000
OCEANIA						
Australia	34,870	29,100	30,649	33,864	33,644	34,241
New Zealand	43,711	38,712	39,879	33,705	33,435	33,775
Subtotal.....	78,581	67,812	70,528	67,569	67,079	68,016
T O T A L	342,096	339,847	363,830	381,574	381,286	381,344

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

LAMB, MUTTON AND GOAT MEAT STOCKS
SELECTED COUNTRIES

1,000 METRIC TONS
JANUARY 1

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
United States	6	4	3	4	4	3
EUROPEAN COMMUNITY						
Belgium-Luxembourg	0	0	0	0	0	0
Germany	1	1	1	2	2	0
Greece	0	2	2	8	8	4
Italy	1	0	0	0	0	0
Portugal	2	5	5	5	8	10
United Kingdom	30	27	18	16	22	22
Subtotal.....	34	35	26	31	40	36
EASTERN EUROPE						
Bulgaria	4	4	4	4	4	4
Romania	4	4	3	4	5	4
Yugoslavia	10	10	13	15	15	15
Subtotal.....	18	18	20	23	24	23
MIDDLE EAST						
Turkey	40	45	45	35	30	30
OTHER ASIA						
Japan	32	35	30	25	25	30
OCEANIA						
Australia	29	25	9	18	39	31
New Zealand	82	59	78	69	57	59
Subtotal.....	111	84	87	87	96	90
T O T A L	241	221	211	205	219	212

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

LAMB, MUTTON AND GOAT MEAT PRODUCTION
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Mexico	73	73	75	76	78	80
United States	143	152	157	165	165	165
Subtotal.....	216	225	232	241	243	245
SOUTH AMERICA						
Argentina	82	87	96	88	85	87
EUROPEAN COMMUNITY						
Belgium-Luxembourg	7	7	7	7	6	6
Denmark	1	1	2	2	2	2
France	157	153	160	193	190	190
Germany	48	49	42	50	50	43
Greece	124	123	130	130	126	127
Ireland	48	49	63	82	89	93
Italy	68	76	80	85	84	89
Netherlands	10	12	13	16	18	19
Portugal	29	30	28	28	28	28
Spain	225	231	231	236	240	245
United Kingdom	297	321	368	371	390	370
Subtotal.....	1,014	1,052	1,124	1,200	1,223	1,212
EASTERN EUROPE						
Bulgaria	98	89	78	77	70	70
Czechoslovakia	10	10	10	10	10	10
Hungary	5	4	4	4	4	4
Poland	29	25	22	28	33	20
Romania	63	60	72	90	78	73
Yugoslavia	65	70	69	67	65	63
Subtotal.....	270	258	255	276	260	240
FORMER USSR	905	960	1,000	1,008	965	900
MIDDLE EAST						
Turkey	382	380	375	370	365	360
NORTH AFRICA						
Egypt	77	78	78	81	82	83
OTHER AFRICA						
South Africa, Republic of	201	194	202	238	236	236
SOUTH ASIA						
India	550	544	560	570	579	585
OTHER ASIA						
China (Mainland)	719	802	962	1,090	1,134	1,200
Korea, Republic of	3	1	1	0	0	0
Subtotal.....	722	803	963	1,090	1,134	1,200
OCEANIA						
Australia	591	549	585	646	625	638
New Zealand	583	576	574	500	529	526
Subtotal.....	1,174	1,125	1,159	1,146	1,154	1,164
T O T A L	5,593	5,706	6,044	6,308	6,326	6,312

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

LAMB, MUTTON AND GOAT MEAT IMPORTS
SELECTED COUNTRIES

1,000 METRIC TONS
CARCASS WEIGHT EQUIVALENT

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Mexico	2	3	8	10	12	15
United States	20	23	29	27	27	27
Subtotal.....	22	26	37	37	39	42
SOUTH AMERICA						
Argentina	0	0	0	2	3	2
EUROPEAN COMMUNITY						
Belgium-Luxembourg	15	15	16	17	17	17
Denmark	3	3	3	3	3	3
France	93	103	120	126	136	145
Greece	15	14	22	15	15	16
Italy	21	23	25	23	22	23
Netherlands	3	3	4	4	5	5
Portugal	4	4	6	10	12	13
Spain	11	15	16	20	16	16
United Kingdom	131	131	118	129	98	130
Subtotal.....	321	337	363	380	358	404
Excluding EC Intra-Trade	206	210	212	229	204	232
EASTERN EUROPE						
Yugoslavia	0	0	0	1	0	0
FORMER USSR	35	18	15	15	20	30
NORTH AFRICA						
Egypt	7	4	5	4	0	0
OTHER AFRICA						
South Africa, Republic of	2	3	2	1	1	1
OTHER ASIA						
Japan	153	155	139	128	130	120
Korea, Republic of	16	25	26	23	17	20
Subtotal.....	169	180	165	151	147	140
T O T A L	556	568	587	591	568	619
Excluding EC Intra-trade	441	441	436	440	414	447

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

LAMB, MUTTON AND GOAT MEAT EXPORTS
SELECTED COUNTRIES

1,000 METRIC TONS
CARCASS WEIGHT EQUIVALENT

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
United States	1	1	1	1	1	1
SOUTH AMERICA						
Argentina	7	8	7	10	12	12
EUROPEAN COMMUNITY						
Belgium-Luxembourg	4	4	5	4	4	4
France	5	5	5	7	7	7
Germany	9	9	3	8	11	4
Greece	0	0	1	0	0	0
Ireland	24	26	38	55	60	63
Italy	0	2	3	2	1	1
Netherlands	6	5	6	6	6	7
Spain	8	11	7	3	4	4
United Kingdom	71	76	89	80	79	95
Subtotal.....	127	138	157	165	172	185
Excluding EC Intra-Trade	12	12	6	11	14	13
EASTERN EUROPE						
Bulgaria	1	1	0	0	0	0
Czechoslovakia	3	3	3	3	3	3
Hungary	3	2	2	2	2	2
Romania	45	45	50	0	0	0
Yugoslavia	6	5	5	2	2	3
Subtotal.....	58	56	60	7	7	8
FORMER USSR	1	1	1	1	0	0
MIDDLE EAST						
Turkey	22	20	16	7	5	5
SOUTH ASIA						
India	9	7	7	7	6	7
OTHER ASIA						
China (Mainland)	4	3	1	3	6	8
Korea, Republic of	16	25	26	22	14	15
Subtotal.....	20	28	27	25	20	23
OCEANIA						
Australia	207	202	193	241	264	248
New Zealand	490	466	502	435	445	443
Subtotal.....	697	668	695	676	709	691
T O T A L	942	927	971	899	932	932
Excluding EC Intra-trade	827	801	820	745	774	760

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

LAMB, MUTTON AND GOAT MEAT CONSUMPTION
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - CARCASS WEIGHT EQUIVALENT - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Mexico	75	76	83	86	90	95
United States	164	175	184	191	192	190
Subtotal.....	239	251	267	277	282	285
SOUTH AMERICA						
Argentina	75	79	89	80	76	77
EUROPEAN COMMUNITY						
Belgium-Luxembourg	18	18	18	20	19	19
Denmark	4	4	5	5	5	5
France	245	251	275	312	319	328
Germany	64	65	71	75	75	75
Greece	137	137	145	145	145	144
Ireland	24	23	25	27	29	30
Italy	90	97	102	106	105	111
Netherlands	7	10	11	14	17	17
Portugal	30	34	34	35	38	40
Spain	228	235	240	253	252	257
United Kingdom	360	385	399	414	409	407
Subtotal.....	1,207	1,259	1,325	1,406	1,413	1,433
EASTERN EUROPE						
Bulgaria	97	88	78	77	70	70
Czechoslovakia	7	7	7	7	7	7
Hungary	2	2	2	2	2	2
Poland	29	25	22	28	33	20
Romania	18	16	21	89	79	73
Yugoslavia	59	62	62	66	63	61
Subtotal.....	212	200	192	269	254	233
FORMER USSR	939	977	1,014	1,022	985	930
MIDDLE EAST						
Turkey	355	360	369	368	360	355
NORTH AFRICA						
Egypt	84	82	83	85	82	83
OTHER AFRICA						
South Africa, Republic of	203	197	204	239	237	237
SOUTH ASIA						
India	541	537	553	563	573	578
OTHER ASIA						
China (Mainland)	715	799	961	1,087	1,128	1,192
Japan	150	160	144	128	125	125
Korea, Republic of	3	1	1	1	3	5
Subtotal.....	868	960	1,106	1,216	1,256	1,322
OCEANIA						
Australia	388	363	383	384	369	394
New Zealand	116	91	81	77	82	75
Subtotal.....	504	454	464	461	451	469
T O T A L	5,227	5,356	5,666	5,986	5,969	6,002

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BOVINE HIDES AND SKINS BEGINNING STOCKS
SELECTED COUNTRIES

- - - - 1,000 METRIC TONS - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
SOUTH AMERICA						
Colombia	0	0	0	1	5	5
Venezuela	0	0	0	11	4	2
Subtotal.....	0	0	0	12	9	7
EUROPEAN COMMUNITY						
Belgium-Luxembourg	2	2	2	1	4	3
France	14	15	19	22	24	22
Greece	7	6	4	2	2	2
Italy	0	0	0	0	33	50
Portugal	12	9	4	7	17	11
Subtotal.....	35	32	29	32	80	88
EASTERN EUROPE						
Romania	4	4	3	3	3	2
MIDDLE EAST						
Turkey	4	5	3	3	5	6
OTHER ASIA						
Hong Kong	1	1	2	1	1	1
Japan	57	61	76	64	75	84
Korea, Republic of	8	10	7	10	11	12
Subtotal.....	66	72	85	75	87	97
OCEANIA						
New Zealand	0	10	8	7	11	7
T O T A L	109	123	128	132	195	207

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BOVINE HIDES AND SKINS PRODUCTION
SELECTED COUNTRIES

- - - - 1,000 METRIC TONS - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	85	82	84	78	73	75
Mexico	122	176	222	181	155	156
United States	1,128	1,022	1,086	1,033	1,045	1,082
Subtotal.....	1,335	1,280	1,392	1,292	1,273	1,313
CARIBBEAN						
Dominican Republic	6	7	6	5	6	6
SOUTH AMERICA						
Argentina	314	303	304	307	308	300
Brazil	350	390	400	540	545	570
Colombia	86	93	97	105	109	110
Uruguay	32	35	36	34	34	34
Venezuela	28	31	34	38	37	36
Subtotal.....	810	852	871	1,024	1,033	1,050
EUROPEAN COMMUNITY						
Belgium-Luxembourg	32	30	28	32	33	33
Denmark	27	25	24	23	24	23
France	193	185	170	175	180	180
Germany	203	191	180	195	205	177
Greece	10	8	9	9	9	8
Ireland	45	42	44	47	47	47
Italy	91	89	88	92	94	91
Netherlands	52	53	51	56	63	61
Portugal	10	11	12	11	10	10
Spain	48	46	45	51	47	47
United Kingdom	101	90	91	92	93	92
Subtotal.....	812	770	742	783	805	769
EASTERN EUROPE						
Czechoslovakia	55	58	56	56	50	50
Hungary	14	13	14	15	15	12
Poland	80	80	80	95	82	74
Romania	25	24	21	26	19	13
Yugoslavia	39	39	39	42	37	35
Subtotal.....	213	214	210	234	203	184
FORMER USSR	1,060	1,090	1,090	1,050	1,095	1,075
MIDDLE EAST						
Turkey	62	63	65	67	69	71
OTHER AFRICA						
South Africa, Republic of	59	51	55	55	58	61
OTHER ASIA						
Taiwan	1	1	1	1	1	1
Hong Kong	3	3	3	3	3	3
Japan	46	45	43	43	44	46
Korea, Republic of	21	18	11	11	11	14
Subtotal.....	71	67	58	58	59	64
OCEANIA						
Australia	144	139	137	149	147	146
New Zealand	54	41	35	40	44	44
Subtotal.....	198	180	172	189	191	190
T O T A L	4,626	4,574	4,661	4,757	4,792	4,783

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BOVINE HIDES AND SKINS IMPORTS
SELECTED COUNTRIES

- - - - 1,000 METRIC TONS - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	25	22	25	21	20	20
Mexico	30	39	40	52	70	90
United States	23	32	45	35	30	25
Subtotal.....	78	93	110	108	120	135
CARIBBEAN						
Dominican Republic	2	2	0	0	0	0
SOUTH AMERICA						
Brazil	29	60	60	20	15	30
Colombia	0	1	0	0	0	2
Uruguay	1	1	1	0	0	0
Venezuela	7	6	0	0	2	4
Subtotal.....	37	68	61	20	17	36
EUROPEAN COMMUNITY						
Belgium-Luxembourg	23	21	17	20	20	21
Denmark	2	2	4	4	3	3
France	15	24	20	18	15	15
Germany	68	71	71	58	55	65
Greece	14	14	14	16	16	16
Ireland	2	2	3	3	3	3
Italy	353	345	351	383	385	350
Netherlands	83	78	79	80	75	75
Portugal	40	32	56	74	60	64
Spain	86	81	86	94	86	82
United Kingdom	42	34	31	38	41	37
Subtotal.....	728	704	732	788	759	731
Excluding EC Intra-Trade	249	247	298	319	279	247
EASTERN EUROPE						
Czechoslovakia	145	145	145	115	115	115
Hungary	22	15	13	10	8	8
Poland	41	37	44	6	25	30
Romania	35	40	43	43	30	35
Yugoslavia	15	22	24	25	20	20
Subtotal.....	258	259	269	199	198	208
FORMER USSR	2	1	1	1	1	1
MIDDLE EAST						
Turkey	9	5	6	9	10	10
OTHER ASIA						
Taiwan	132	107	80	73	95	89
Hong Kong	53	55	48	54	65	68
Japan	208	230	215	238	210	180
Korea, Republic of	339	333	355	373	395	410
Subtotal.....	732	725	698	738	765	747
OCEANIA						
Australia	0	2	1	0	1	1
T O T A L	1,846	1,859	1,878	1,863	1,871	1,869
Excluding EC Intra-trade	1,367	1,402	1,444	1,390	1,387	1,381

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BOVINE HIDES AND SKINS EXPORTS
SELECTED COUNTRIES

- - - - 1,000 METRIC TONS - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	82	80	91	88	80	82
United States	654	605	671	675	630	650
Subtotal.....	736	685	762	763	710	732
CARIBBEAN						
Dominican Republic	2	0	2	2	2	2
SOUTH AMERICA						
Brazil	30	70	40	78	60	80
Colombia	1	2	2	1	1	1
Uruguay	1	1	1	0	0	0
Venezuela	0	0	3	18	12	10
Subtotal.....	32	73	46	97	73	91
EUROPEAN COMMUNITY						
Belgium-Luxembourg	41	37	34	36	41	41
Denmark	22	20	19	20	19	19
France	160	158	140	144	150	150
Germany	136	126	126	129	130	120
Greece	2	1	2	0	0	0
Ireland	42	39	42	45	48	48
Italy	17	13	17	17	17	17
Netherlands	108	97	103	105	105	100
Portugal	0	1	4	8	10	11
Spain	19	20	16	16	16	16
United Kingdom	82	64	56	73	92	80
Subtotal.....	629	576	559	593	628	602
Excluding EC Intra-Trade	150	127	132	134	150	113
EASTERN EUROPE						
Poland	8	8	5	41	10	10
Yugoslavia	0	0	0	5	2	1
Subtotal.....	8	8	5	46	12	11
FORMER USSR	96	170	180	150	100	125
MIDDLE EAST						
Turkey	0	0	1	0	0	0
OTHER AFRICA						
South Africa, Republic of	17	11	14	18	19	19
OTHER ASIA						
Hong Kong	46	53	46	53	64	68
Korea, Republic of	0	0	0	3	5	10
Subtotal.....	46	53	46	56	69	78
OCEANIA						
Australia	107	130	124	134	137	136
New Zealand	41	26	23	23	33	31
Subtotal.....	148	156	147	157	170	167
T O T A L	1,714	1,732	1,762	1,882	1,783	1,827
Excluding EC Intra-trade	1,235	1,283	1,335	1,423	1,305	1,338

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

BOVINE HIDES AND SKINS
TOTAL UTILIZATION
SELECTED COUNTRIES

- - - - 1,000 METRIC TONS - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	28	24	18	11	13	13
Mexico	152	215	262	233	225	246
United States	497	449	460	393	445	457
Subtotal.....	677	688	740	637	683	716
CARIBBEAN						
Dominican Republic	6	9	4	3	4	4
SOUTH AMERICA						
Argentina	314	303	304	307	308	300
Brazil	349	380	420	482	500	520
Colombia	85	92	94	100	108	111
Uruguay	32	35	36	34	34	34
Venezuela	35	37	20	27	29	31
Subtotal.....	815	847	874	950	979	996
EUROPEAN COMMUNITY						
Belgium-Luxembourg	14	14	12	13	13	14
Denmark	7	7	9	7	8	7
France	47	47	47	47	47	47
Germany	135	136	125	124	130	122
Greece	23	23	23	25	25	25
Ireland	5	5	5	5	2	2
Italy	427	421	422	425	445	444
Netherlands	27	34	27	31	33	36
Portugal	53	47	61	67	66	66
Spain	115	107	115	129	117	113
United Kingdom	61	60	66	57	42	49
Subtotal.....	914	901	912	930	928	925
EASTERN EUROPE						
Czechoslovakia	200	203	201	171	165	165
Hungary	36	28	27	25	23	20
Poland	113	109	119	60	97	94
Romania	60	65	64	69	50	48
Yugoslavia	54	61	63	62	55	54
Subtotal.....	463	466	474	387	390	381
FORMER USSR	966	921	911	901	996	951
MIDDLE EAST						
Turkey	70	70	70	74	78	82
OTHER AFRICA						
South Africa, Republic of	42	40	41	37	39	42
OTHER ASIA						
Taiwan	133	108	81	74	96	90
Hong Kong	10	4	6	4	4	3
Japan	250	260	270	270	245	240
Korea, Republic of	358	354	363	380	400	420
Subtotal.....	751	726	720	728	745	753
OCEANIA						
Australia	37	11	14	15	11	11
New Zealand	3	17	13	13	15	16
Subtotal.....	40	28	27	28	26	27
T O T A L	4,744	4,696	4,773	4,675	4,868	4,877

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

TALLOW AND GREASE BEGINNING STOCKS
SELECTED COUNTRIES

1,000 METRIC TONS
- - - - JANUARY 1 - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
United States	260	220	215	212	204	200
CARIBBEAN						
Dominican Republic	0	0	0	2	2	2
CENTRAL AMERICA						
El Salvador	14	12	11	11	9	7
SOUTH AMERICA						
Colombia	8	7	25	16	11	13
EUROPEAN COMMUNITY						
Belgium-Luxembourg	0	0	0	0	2	3
Germany	3	3	3	0	0	0
Greece	0	0	0	0	0	1
Netherlands	13	18	24	19	20	20
Portugal	5	5	6	8	8	6
Subtotal.....	21	26	33	27	30	30
EASTERN EUROPE						
Romania	1	1	1	1	1	1
Yugoslavia	0	0	0	2	3	1
Subtotal.....	1	1	1	3	4	2
MIDDLE EAST						
Turkey	7	4	3	5	5	4
SOUTH ASIA						
Pakistan	4	0	0	0	0	0
OTHER ASIA						
Taiwan	5	5	0	0	0	0
Japan	40	41	53	67	74	72
Korea, Rep. of	7	7	7	7	12	17
Subtotal.....	52	53	60	74	86	89
OCEANIA						
New Zealand	0	0	10	3	1	3
T O T A L	367	323	358	353	352	350

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

TALLOW AND GREASE PRODUCTION
SELECTED COUNTRIES

- - - - 1,000 METRIC TONS - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	205	200	203	199	195	200
Mexico	43	54	65	58	55	56
United States	3,190	3,188	3,116	3,067	3,095	3,130
Subtotal.....	3,438	3,442	3,384	3,324	3,345	3,386
CARIBBEAN						
Dominican Republic	2	2	2	2	2	2
CENTRAL AMERICA						
Costa Rica	5	5	5	5	5	5
El Salvador	1	1	2	1	1	2
Guatemala	4	2	2	2	2	2
Subtotal.....	10	8	9	8	8	9
SOUTH AMERICA						
Argentina	289	279	278	282	278	270
Brazil	170	190	272	260	260	273
Colombia	28	31	32	35	36	36
Venezuela	8	10	14	13	12	11
Subtotal.....	495	510	596	590	586	590
EUROPEAN COMMUNITY						
Belgium-Luxembourg	26	26	25	20	21	21
Denmark	70	65	83	115	100	100
France	182	186	179	180	185	185
Germany	282	278	280	290	275	245
Greece	3	4	5	4	5	5
Ireland	42	36	45	57	63	66
Italy	110	100	90	95	98	94
Netherlands	127	125	125	142	147	145
Portugal	22	22	24	23	22	22
Spain	84	85	85	93	92	93
United Kingdom	233	200	207	245	250	253
Subtotal.....	1,181	1,127	1,148	1,264	1,258	1,229
EASTERN EUROPE						
Bulgaria	10	10	12	11	10	10
Czechoslovakia	25	24	24	24	22	22
Hungary	7	5	6	6	7	4
Poland	72	74	61	54	65	65
Romania	9	8	7	11	8	6
Yugoslavia	12	11	12	33	30	30
Subtotal.....	135	132	122	139	142	137
FORMER USSR	380	390	400	400	360	350
MIDDLE EAST						
Israel	1	1	1	0	0	0
Turkey	9	10	11	12	13	14
Subtotal.....	10	11	12	12	13	14
SOUTH ASIA						
Pakistan	12	13	13	13	13	13
OTHER ASIA						
China (Mainland)	10	25	25	45	60	65
Japan	219	218	220	215	188	180
Korea, Rep. of	46	53	60	80	100	100
Subtotal.....	275	296	305	340	348	345
OCEANIA						
Australia	350	456	489	540	530	528
New Zealand	132	146	133	110	117	117
Subtotal.....	482	602	622	650	647	645
T O T A L	6,420	6,533	6,613	6,742	6,722	6,720

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

TALLOW AND GREASE IMPORTS
SELECTED COUNTRIES

- - - - 1,000 METRIC TONS - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	9	10	15	14	15	15
Mexico	147	164	172	175	180	190
United States	3	2	5	3	5	5
Subtotal.....	159	176	192	192	200	210
CARIBBEAN						
Dominican Republic	26	19	27	25	24	26
CENTRAL AMERICA						
Costa Rica	0	1	1	1	1	1
El Salvador	34	36	38	45	50	50
Guatemala	31	32	34	29	36	39
Subtotal.....	65	69	73	75	87	90
SOUTH AMERICA						
Argentina	0	0	0	0	8	15
Brazil	29	30	20	54	60	60
Colombia	58	80	55	49	59	62
Venezuela	47	54	31	56	60	63
Subtotal.....	134	164	106	159	187	200
EUROPEAN COMMUNITY						
Belgium-Luxembourg	75	118	126	126	135	141
Denmark	50	24	25	24	25	25
France	43	42	45	50	52	55
Greece	6	6	5	6	6	5
Ireland	1	6	6	5	4	4
Italy	37	62	67	72	73	75
Netherlands	240	242	265	261	253	260
Portugal	13	13	18	9	8	8
Spain	89	96	90	192	190	195
United Kingdom	98	89	78	91	71	70
Subtotal.....	807	853	862	917	912	938
Excluding EC Intra-Trade	344	396	421	479	471	492
EASTERN EUROPE						
Bulgaria	5	5	5	5	5	5
Czechoslovakia	20	20	20	10	10	10
Hungary	1	1	1	1	1	1
Romania	1	1	4	4	3	3
Yugoslavia	2	3	17	17	6	6
Subtotal.....	29	30	47	37	25	25
FORMER USSR	122	110	157	160	175	175
MIDDLE EAST						
Turkey	41	39	72	74	70	75
NORTH AFRICA						
Egypt	150	155	62	20	27	30
SOUTH ASIA						
Pakistan	95	100	100	100	100	100
OTHER ASIA						
China (Mainland)	88	98	110	80	67	70
Taiwan	68	56	68	71	77	80
Hong Kong	1	1	1	2	1	1
Japan	94	111	126	127	133	110
Korea, Republic of	120	110	116	105	105	120
Subtotal.....	371	376	421	385	383	381
T O T A L	1,999	2,091	2,119	2,144	2,190	2,250
Excluding EC Intra-trade	1,536	1,634	1,678	1,705	1,744	1,799

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

TALLOW AND GREASE EXPORTS
SELECTED COUNTRIES

- - - - 1,000 METRIC TONS - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	154	178	195	202	195	200
United States	1,253	1,334	1,229	1,074	1,020	1,030
Subtotal.....	1,407	1,512	1,424	1,276	1,215	1,230
SOUTH AMERICA						
Argentina	34	22	18	23	13	5
EUROPEAN COMMUNITY						
Belgium-Luxembourg	19	15	17	13	22	27
Denmark	35	35	40	45	40	40
France	55	58	55	60	67	70
Germany	247	271	215	211	190	180
Ireland	40	39	42	57	61	64
Italy	10	20	28	25	25	23
Netherlands	66	65	56	52	63	65
United Kingdom	27	17	26	25	24	25
Subtotal.....	499	520	479	488	492	494
Excluding EC Intra-Trade	39	63	38	51	51	38
EASTERN EUROPE						
Bulgaria	3	3	3	3	3	3
Romania	0	3	2	0	0	0
Yugoslavia	0	0	1	2	2	2
Subtotal.....	3	6	6	5	5	5
FORMER USSR	1	1	1	1	1	0
MIDDLE EAST						
Turkey	10	8	5	9	6	5
OTHER ASIA						
China (Mainland)	0	0	0	0	2	2
Hong Kong	1	1	1	2	1	1
Japan	12	7	4	5	3	2
Subtotal.....	13	8	5	7	6	5
OCEANIA						
Australia	190	237	214	233	232	230
New Zealand	119	132	130	103	105	110
Subtotal.....	309	369	344	336	337	340
T O T A L	2,276	2,446	2,282	2,145	2,075	2,084
Excluding EC Intra-trade	1,816	1,989	1,841	1,708	1,634	1,628

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

TALLOW AND GREASE CONSUMPTION
SELECTED COUNTRIES

- - - - 1,000 METRIC TONS - - - -

	1987	1988	1989	1990	(p)1991	(f)1992
NORTH AMERICA						
Canada	60	32	23	11	15	15
Mexico	190	218	237	233	235	246
United States	1,980	1,861	1,897	2,004	2,084	2,100
Subtotal.....	2,230	2,111	2,157	2,248	2,334	2,361
CARIBBEAN						
Dominican Republic	28	21	27	27	26	28
CENTRAL AMERICA						
Costa Rica	5	6	6	6	6	6
El Salvador	37	38	40	48	53	53
Guatemala	35	34	36	31	38	41
Subtotal.....	77	78	82	85	97	100
SOUTH AMERICA						
Argentina	255	257	260	259	273	280
Brazil	199	220	292	314	320	333
Colombia	87	93	96	89	93	98
Venezuela	55	64	45	69	72	74
Subtotal.....	596	634	693	731	758	785
EUROPEAN COMMUNITY						
Belgium-Luxembourg	82	129	134	131	133	133
Denmark	85	54	68	94	85	85
France	170	170	169	170	170	170
Germany	190	162	205	160	180	165
Greece	9	10	10	10	10	10
Ireland	3	3	9	5	6	6
Italy	137	142	129	142	146	146
Netherlands	296	296	339	350	337	340
Portugal	35	34	40	32	32	30
Spain	173	181	175	285	282	288
United Kingdom	304	272	259	311	297	298
Subtotal.....	1,484	1,453	1,537	1,690	1,678	1,671
EASTERN EUROPE						
Bulgaria	12	12	14	13	12	12
Czechoslovakia	45	44	44	34	32	32
Hungary	8	6	7	7	8	5
Poland	72	74	61	54	65	65
Romania	10	6	9	15	11	9
Yugoslavia	14	14	20	47	36	34
Subtotal.....	161	156	155	170	164	157
FORMER USSR	501	499	556	559	534	525
MIDDLE EAST						
Israel	1	1	1	0	0	0
Turkey	43	42	76	77	78	83
Subtotal.....	44	43	77	77	78	83
NORTH AFRICA						
Egypt	150	155	62	20	27	30
SOUTH ASIA						
Pakistan	111	113	113	113	113	113
OTHER ASIA						
China (Mainland)	98	123	135	125	125	133
Taiwan	68	61	68	71	77	80
Japan	300	310	328	330	320	300
Korea, Rep. of	166	163	176	180	200	220
Subtotal.....	632	657	707	706	722	733
OCEANIA						
Australia	160	219	275	307	298	298
New Zealand	13	4	10	9	10	9
Subtotal.....	173	223	285	316	308	307
T O T A L	6,187	6,143	6,451	6,742	6,839	6,893

(p)-preliminary (f)-forecast

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
March 1992

DAIRY, LIVESTOCK AND POULTRY DIVISION
FOREIGN AGRICULTURAL SERVICE

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